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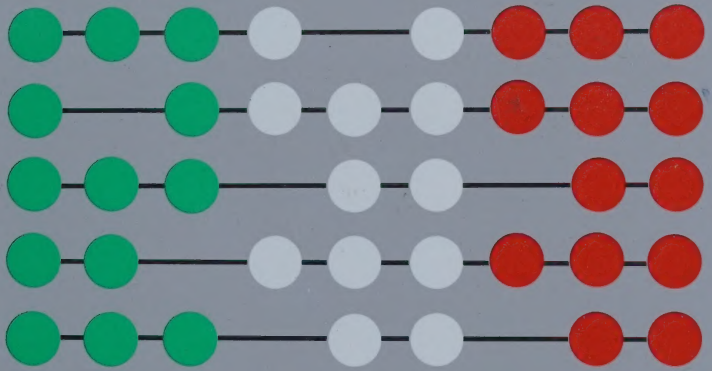
MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ITALIAN AGRICULTURE IN FIGURES



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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

Except where indicated, all statistics in this publication,
are from ISTAT, the Italian Central Statistical Office.
EUROSTAT data have been used for
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ITALIAN AGRICULTURE IN FIGURES

1988

MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ITALIAN AGRICULTURE IN FIGURES

Prepared by the
Istituto Nazionale di Economia Agraria

1988

Calogero Mannino
Minister of Agriculture and Forests

In publishing this booklet the intention of the Ministry for Agriculture and Forests is to make available a brief but comprehensive outline of the Italian agricultural sector.

The basic objective is that of supplying a readily available official source of reference for interested Italian and foreign public.
The booklet will provide a useful aide-mémoire for all those who, for reasons of work, need information about data and trends affecting Italian agriculture from year to year. The Ministry intends to update the publication periodically in order to ensure that it includes the most recent data available.

The publication is divided into three sections:

- analysis of economic trends;
- structural analysis;
- legal and administrative considerations.

Names and addresses of the main bodies operating in the agricultural sector are supplied in the Appendix.

The data presented are the most recent available from domestic and European sources; they refer to the year 1988 for economic trends and for the legal framework and to 1985 for structural analysis.

The Ministry of Agriculture and Forests is grateful for the collaboration of the National Institute of Agricultural Economics in producing this publication.

TERRITORY, POPULATION AND ECONOMY:

GENERAL CHARACTERISTICS

An important feature of the Italian national territory is the predominance of hilly and mountainous areas.

Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre.

Population has continued to increase over recent decades. The rate of population growth, has, however, fallen from 0.5% to about 0.2%.

There are considerable differences in climatic conditions over the peninsula, from the continental climate of the North to the milder sub-continental conditions of the coastal areas and the typically Mediterranean climate of the South and the Islands.

TERRITORY AND POPULATION IN 1988

Districts	Total area km²	Agricultural area (1) %	Population (000)	Density no./km²	Work force (000)
North	119.889	46,7	25.510	213	11.326
Centre	58.344	52,5	10.969	188	4.687
South	123.046	67,8	21.025	171	7.975
Italy	301.279	56,4	57.504	191	23.988

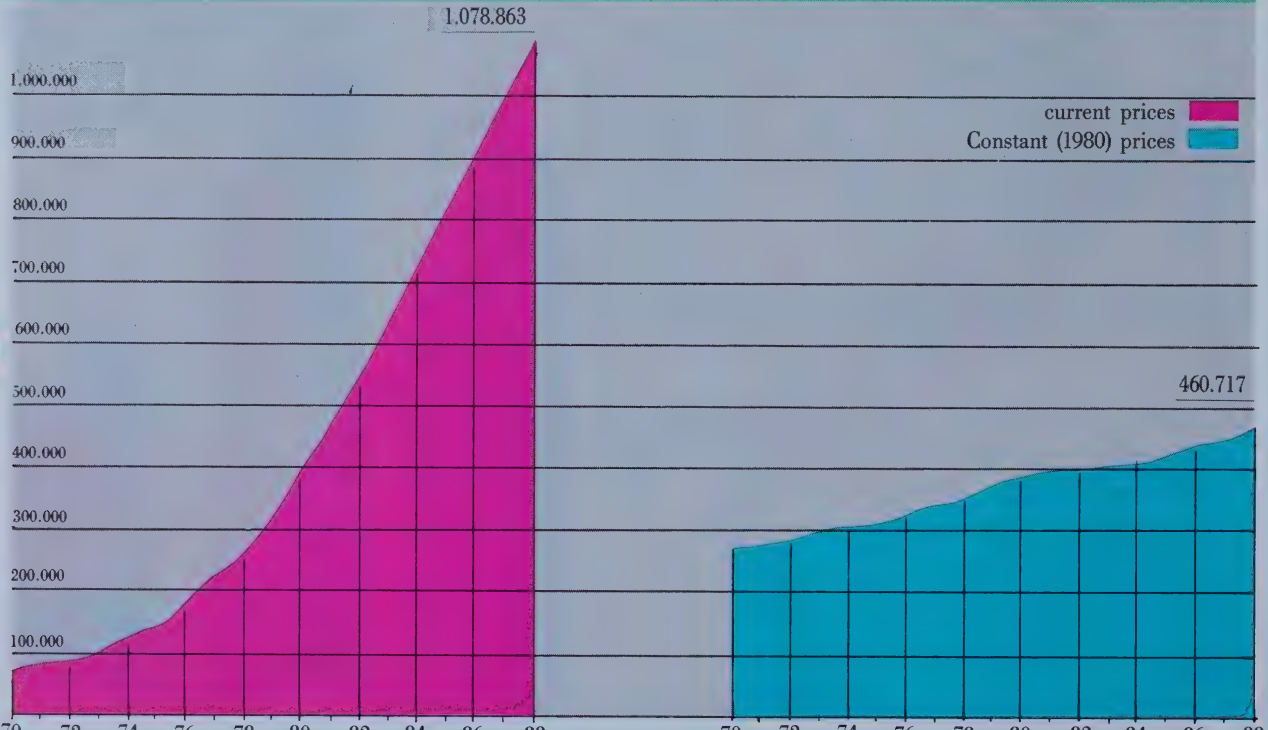
(1) Including arable land, land under tree crops permanent pasture, nurseries. Percentage of total land area.

TERRITORY BY ALTIMETRIC ZONE (000 ha)

Zone	North	Centre	South	Italy
Mountains	5.532	1.576	3.502	10.610
Hills	2.272	3.722	6.548	12.542
Plains	4.185	536	2.254	6.975
Total	11.989	5.834	12.304	30.127

TOTAL AREA BY ALTIMETRIC ZONE

TRENDS IN GDP (*) AT MARKET PRICES (billion lire)



(*) Gross Domestic Product.

TRENDS IN GDP PER CAPITA AND PER WU (*) (000 lire)

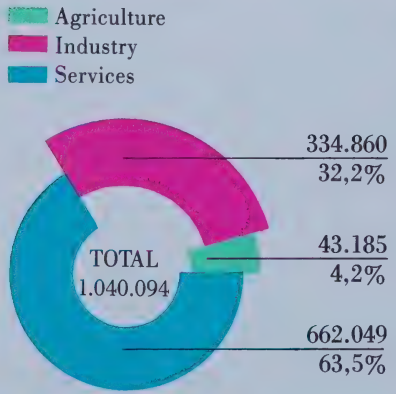
(*) Work units.

ITALIAN AGRICULTURE IN 1988

VALUE ADDED IN AGRICULTURE

In 1988 the direct contribution of the primary sector to total value added was 4.2%. At constant prices, value added in agriculture fell from 8.1% of the total for the whole economy in 1970, to 6.2% in 1980 and to 5.4% in 1988.
In the same period, the contribution of the tertiary sector increased whilst that of industry remained stationary.

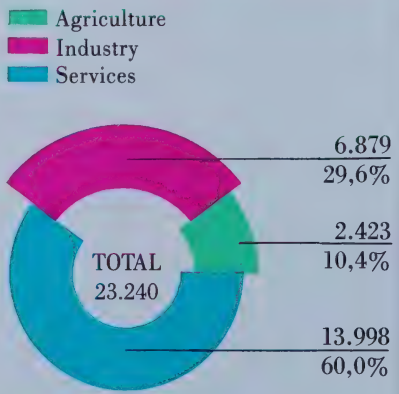
VA BY SECTOR (billion lire)



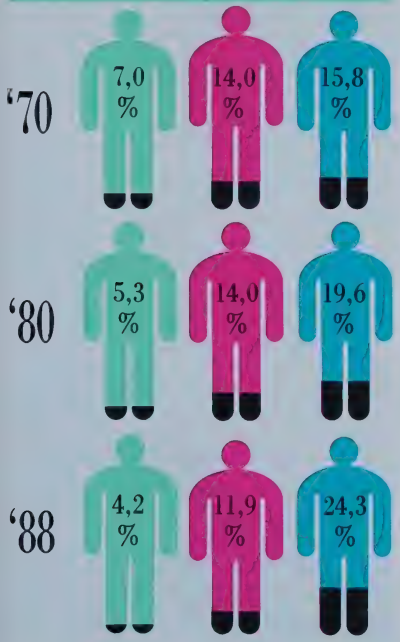
EMPLOYMENT

The structure of employment has changed considerably over time: in 1970 agriculture and industry accounted for about 60% of total employment; in 1988 the situation was completely reversed and the service sector absorbed 60% of employment.
Between 1970 and 1988 the number of agricultural workers, in terms of work units, decreased by 1,358,000 (—35.9%), passing from 19% to about 10.4% of total employment.
In the same period the ratio between agricultural employment and total population steadily changed: in 1970 it was one to fourteen, in 1980, one to nineteen and in 1988 one to twenty four. In industry the corresponding ratio remained almost stationary, whereas in the service sector change was in the opposite direction.
In 1988 30.7% of agricultural workers were wage employees.

WU PER SECTOR (thousands)



WORK UNITS PER SECTOR TO TOTAL POPULATION



THE SHARE OF AGRICULTURE IN THE NATIONAL ECONOMY

INTERNATIONAL COMPARISONS

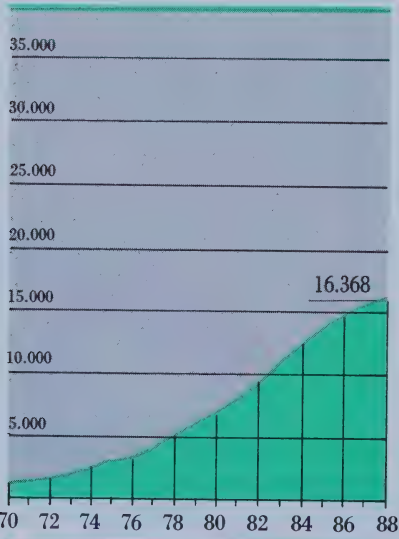
Countries	Value added (%)	No.s employed (%)
Italy	5,2 (*)	10,5
France	3,9	7,1
Spain	5,6	15,1
Greece	14,4	27,0
Fed. Rep. of Germany	2,0	5,2
Holland	4,7	4,7
United Kingdom	1,7	2,4
EEC	3,5	8,0
USA	2,1	3,0
Japan	3,0	8,3

(*) EUROSTAT data which differs from ISTAT data previously cited on account of different methods of calculation.

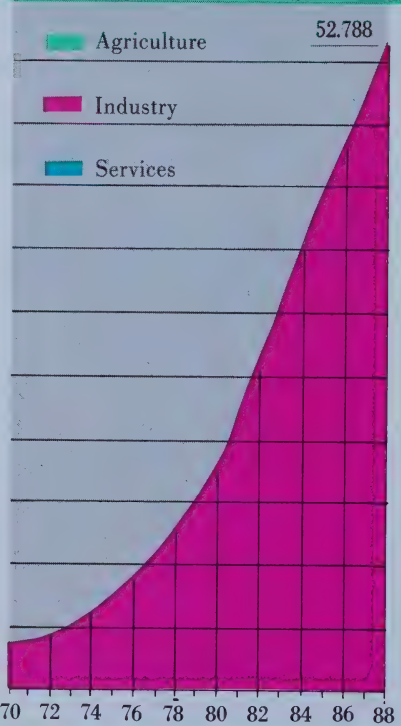
In Italy the agricultural sector has a greater relative weight than is the case in several other industrial countries, both as regards value added and as regards employment. In recent years trends in these variables are bringing Italy closer to the positions of the other countries of the centre and north of Europe.

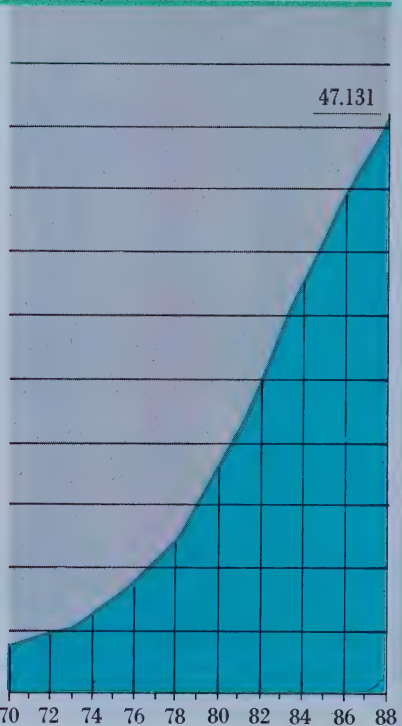
PRODUCTIVITY

In 1988 value added in agriculture per work unit at constant market prices amounted to half the national average and to about 40% of that in industry.



VA/WU BY SECTOR AT CURRENT PRICES (000 lire)





VA/WU BY SECTOR AT 1980 PRICES (000 lire)

FOOD CONSUMPTION

In 1988 household expenditure on food amounted to more than 140,000 billion lire, about one fifth of total expenditure.

The percentage of food to total expenditure has steadily fallen over time.

If, in addition to food consumption at home, that outside the home (in restaurants or canteens) is considered, total expenditure rises considerably and amounts to between 160,000 and 170,000 billion lire, including the expenditure of foreign tourists in Italy.

THE PATTERN OF FOOD CONSUMPTION

Products	% food expenditure	Annual average rate of change 1970/88	
		quantity (%)	price (%)
Bread and cereals	11,6	+0,76	+12,74
Meat	28,0	+2,01	+11,25
Fish	6,1	+2,40	+14,40
Dairy produce and eggs	13,8	+1,95	+12,43
Fats and oils	3,7	+1,02	+10,23
Horticultural produce (1)	22,9	+1,10	+12,93
Other (2)	6,7	+1,73	+11,17
Alcoholic beverages	5,5	—0,25	+10,92
Non-alcoholic beverages	1,7	+4,39	+11,62
Total	100,0	+1,46	+11,93

(1) Including patatoes.

(2) Coffee, tea, cocoa, sweets, etc.

The most important item of household food expenditure is meat which, at 39,340 billion lire in 1988, accounts for 28% of total expenditure.

This is followed by horticultural products with an expenditure of more than 32,000 billion lire (23%); milk, cheese and eggs with 19,300 billion lire (11.6%); fish, 8,600 billion lire (6%); wine and other alcoholic beverages, 2,400 billion lire (5.5%).

Between 1970 and 1988 the relative weight of expenditure on household food consumption shows the following trends:

- meat
- dairy produce
- horticultural produce
- wine
- fish

HOUSEHOLD CONSUMPTION OF MAIN FOOD PRODUCTS (kg. per head)

Products	North	Centre	South	Italy
Bread	49,7	65,7	80,7	63,2
Pasta	30,6	36,8	43,9	36,7
Milk	86,2	78,8	71,1	78,8
Cheese	13,1	10,5	11,8	12,1
Eggs	6,8	8,5	9,1	7,8
Beef	20,6	26,0	22,5	22,3
Pork (1)	18,5	22,3	18,8	19,3
Poultry	12,8	18,8	12,8	13,9
Fish	7,5	11,5	13,7	10,5
Fresh vegetables	156,8	195,6	197,1	178,9

(1) Excluding salami etc.

Source: Processed from ISTAT data.

Levels of per capita consumption clearly show the typically Mediterranean character of demand for food in Italy.

As compared with the EEC average, consumption per head of cereals, cereal products and wine is 40% higher; in contrast, consumption of milk and pork are some 20-25% lower.

For other products, beef and cheese, levels are close to European averages.

FOOD CONSUMPTION IN THE EEC (kg. per head)

Food products	Italy	France	Spain	Greece	Fed.Rep. Germany	United Kingdom	EEC12
Cereals and cereal prods.(1)	116	79	74	114	74	79	85
Rice	5	4	6	5	2	3	4
Potatoes	39	74	107	80	74	109	80
Vegetables (2)	174	118	150	207	75	86	111
Fruit inc. citrus (2)	109	75	85	125	116	54	88
Milk (3)	81	96	n.d.	62	88	132	102 (*)
Cheese	15	20	n.d.	22	14	6	14 (*)
Butter	2	8	n.d.	1	6	4	5 (*)
Meat	79	96	72	72	95	70	82
Beef	27	32	11	22	23	22	23
Pork	28	35	33	21	60	24	37
Fats and oils	28	21	28	32	20	32	26
Sugar (4)	27	35	24	28	36	36	33
Wine (5)	66	79	49	32	25	10	42

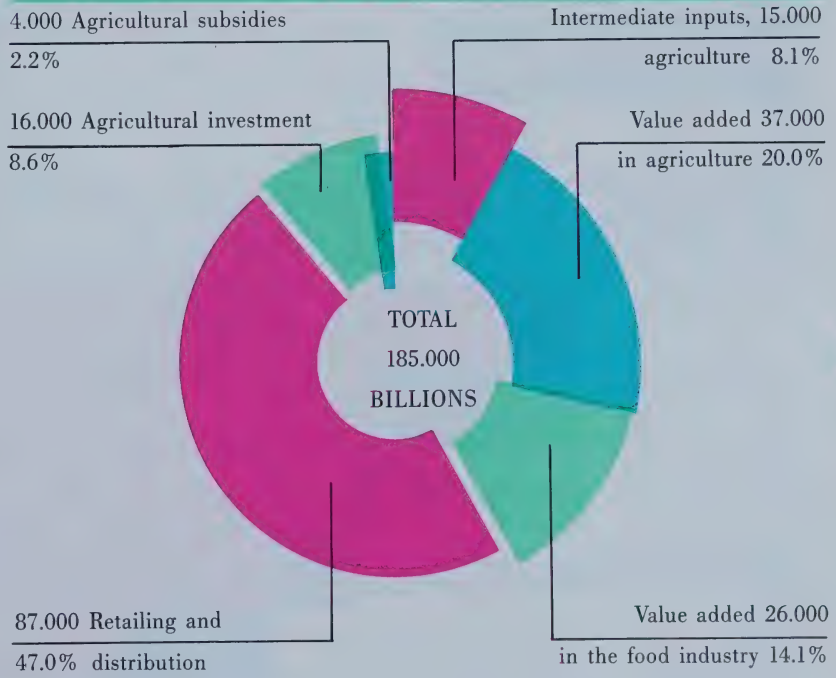
N.B.: Data refer to the three year average 1985-1987.

(1) In flour equivalent.
(2) Including processed.
(3) Including other fresh products.
(4) White sugar equivalent.
(5) Litres per head.
(*) EEC 10

THE AGRO-INDUSTRIAL SYSTEM

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it, both upstream (the production of inputs: fertilisers, pesticides, feed compounds, energy, etc.) and downstream (food and catering industries). The whole system is connected with a dense trading and distribution network. Estimates based on national accounts set the value of the agro-industrial complex in 1988 at 185,000 billion lire, of which 37,000 attributable to value added in agriculture, 15,000 to intermediate inputs, 16,000 to agricultural investment, 26,000 to value added in the food industry and 87,000 to the trading and distributive sector. Services supplied both by the public and the private sectors are not included in the estimates, even though they make an important contribution to the system.

THE MAIN AGGREGATES OF THE AGRO-INDUSTRIAL SYSTEM (*)



(*) Estimates on the basis of value of food production
Source: Calculations based on ISTAT data.

FINAL AGRICULTURAL PRODUCT AND AGRICULTURAL INCOME

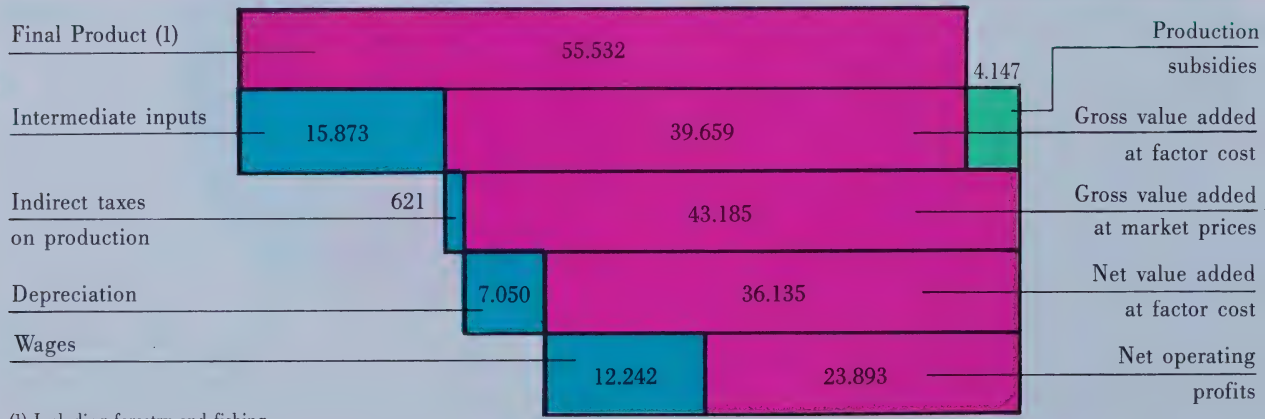
The gross value of final agricultural product, including subsidies, is made up for one quarter, of intermediate inputs (seeds, fertilisers, feed compounds, energy, etc.) and for about one fifth by wages of employed labour.

Subsidies, from the State and from the EEC, make up 7%.

More than 40% of the value of gross final product goes to self-employed labour (owner-operators, owner-managers and family collaborators).

Income per head (including employed and self-employed workers) in the agricultural sector is 54.3% of income per head in other sectors. In 1970, it was 44.6%.

THE STRUCTURE OF AGRICULTURAL INCOME (billion lire)



(1) Including forestry and fishing

Source: Calculations on ISTAT and EUROSTAT data.

PRODUCTION

In 1988 the expansion in production which had been going on for 3 years was interrupted. The value of final output fell by 2.3% in real terms.
This was the outcome of a marked decline in production of field and tree crops, counterbalanced in part by a modest increase in livestock production.

Production of field crops fell by 3.4% in real terms, the most pronounced decrease in the whole of the 1980s except for that of 1984. It affected all sectors, from horticultural produce (—2.3%) to cereals (—4.5%), to industrial crops (—11%), with the exception of flower production (+10.6%).

Production of tree crops continued to be influenced by the cyclical alternation of good and bad years of harvest: as compared with 1987 there was a fall of about 6% in the value of output at constant prices with the marked drop in production of grapes and olives being partly offset by increases in fruit and citrus.

As new plantings came into production, actinidia took on an important position in national fruit production.

VALUE OF FINAL PRODUCT BY SECTOR (billion lire)

Sector	North	Centre	South	Italy
Field crops (1)	7.980	3.510	7.649	19.139
Tree crops	4.155	1.379	7.358	12.892
Livestock	13.435	2.541	3.959	19.935
Forestry	403	127	108	638
Total	25.973	7.557	19.074	52.604

VALUE OF FINAL PRODUCT BY SECTOR AND CHANGES SINCE 1970

(% on values at 1980 prices)

Sector	North		Centre		South		Italy	
	1988 %	change %	1988 %	change %	1988 %	change %	1988 %	change %
Field crops (1)	31,1	+38,8	46,9	+33,1	40,5	+25,5	36,6	+32,4
Tree crops	15,4	— 2,7	17,2	+11,9	38,1	+14,7	23,4	+ 8,1
Livestock	51,9	+47,1	34,1	+24,3	20,8	+26,8	38,5	+39,6
Foresty	2,0	+26,4	1,8	— 7,7	0,6	—58,4	1,5	—31,1
Total	100,0	+34,0	100,0	+25,8	100,0	+21,4	100,0	+28,1

(1) Including forage.

THE VALUE OF FINAL AGRICULTURAL PRODUCT BY MAIN PRODUCTIVE SECTOR (billion lire)

4.549 Grapes
8,8%

2.719 Flower and nursery production
5,2%

2.649 Industrial crops (1)
5,1%

8.644 Vegetables
16,6%

5.567 Cereals and forage (2)
10,7%

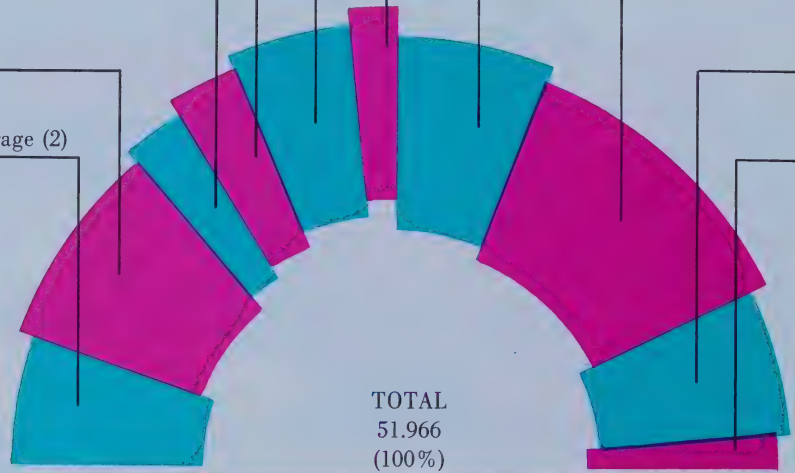
Olives 1.835
3,5%

Fruit and citrus 6.068
11,7%

Meat 12.361
23,8%

Milk 6.181
11,9%

Eggs and other 1.393
2,7%



TOTAL
51.966
(100%)

(1) Sugar beet, tobacco, oilseeds, textile fibres and other industrial products.

(2) Forage crops amount to L. 141 billions and dried pulses to L. 137 billions.

PRODUCTION OF MAIN CROPS AND CHANGES AS COMPARED WITH 1987

Coop	Area		Yield	Harvest		Final product	
	000 ha	change%	q/ha	000 q	change%	billion lire	change%
Soft wheat	1.094	— 8,2	37,3	40.283	—17,9	1.233	—18,8
Hard wheat	1.801	— 5,0	22,5	39.167	—12,5	1.450	—16,3
Maize	843	+ 9,8	75,5	63.184	+ 9,6	1.639	+ 2,4
Rice	198	+ 4,2	56,0	10.935	+ 2,7	655	+ 5,0
Sugar-beet	276	— 8,6	496,6	136.276	—11,1	978	—12,7
Tobacco	77	—	20,0	1.389	— 0,5	526	+ 1,0
Soya	415	—13,7	33,3	13.741	—13,4	960	—14,7
Sunflowers	123	+14,8	20,8	2.500	+ 6,3	143	—
Potatoes (early and common)	127	— 3,1	188,0	23.300	— 5,0	682	— 5,8
Tomatoes	110	— 1,8	394,7	41.889	—13,8	1.433	+17,6
Grapes	1.084	+ 0,1	94,2	99.218	—14,8	—	—
Wine (000 hl.)	—	—	—	63.900	—15,7	3.665	—12,6
Olives	1.194	— 0,2	20,4	23.500	—34,4	—	—
Olives (000 ql.) (oil from pressing)	—	—	—	4.300	—34,8	1.707	—34,2
Apples	88	—	295,6	23.250	+ 4,0	1.088	— 7,2
Pears	51	+ 6,3	220,5	9.801	+ 9,6	632	+12,1
Peaches and nectarines	109	+ 0,9	155,4	14.499	— 4,2	1.027	+ 4,8
Oranges	104	— 2,8	197,0	19.679	+46,5	1.023	+64,5
Lemons	39	— 2,5	180,2	6.807	+15,0	504	+22,9
Mandarines and clementines	32	—	172,2	4.903	+46,8	276	+55,9
Actinidia	16	+23,1	187,4	2.064	+79,0	475	+67,3

There was a slow improvement in the livestock sector. The value of final product increased in real terms by 1%, a slower rate of increase than achieved in 1987 (1.4%).

Increases took place in poultry production (2.3%) eggs (8.5%) and pork (3.7%).

In the other sectors, there was a decrease of almost 3% for beef and of 1.3% for sheep and goats; production of cows' milk remained unchanged.

PRICES AND COSTS

On the whole, prices for agricultural products rose less rapidly than those for the main inputs.

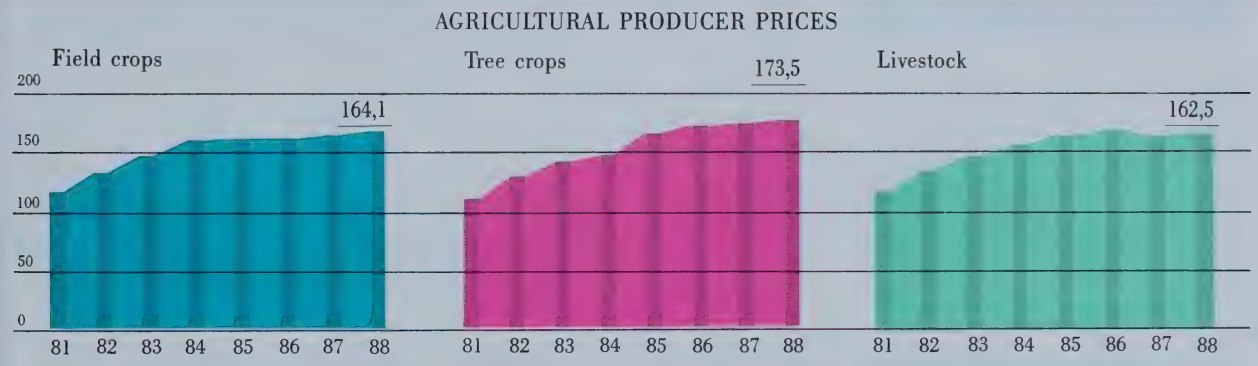
Comparison with prices for investment goods and the cost of labour is particularly unfavourable.

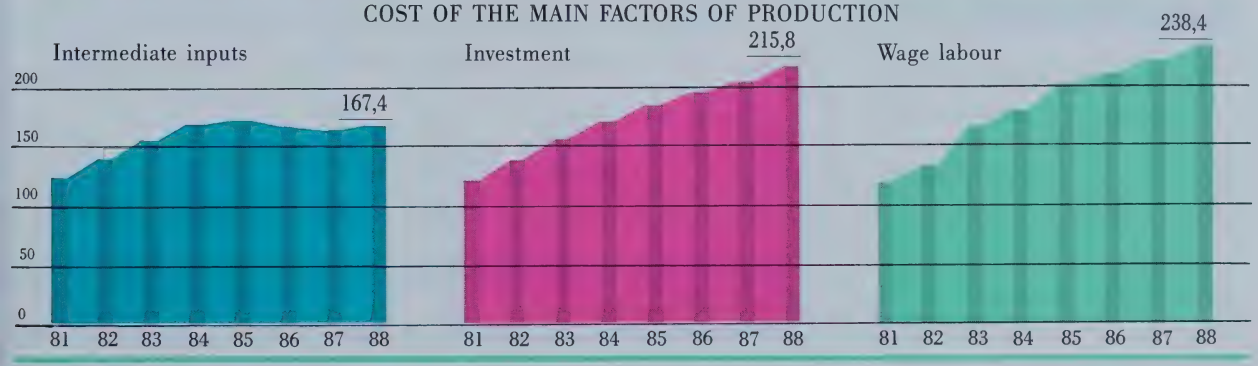
MAIN LIVESTOCK PRODUCTS AND CHANGES AS COMPARED WITH 1987

Product	Numbers 000 head	change%	Production (6) 000 q.	change%	Final product billion lire	change%
Cattle (1)	8.863	—0,4	15.487	—2,8	4.925	—2,1
Pigs	9.359	—0,3	14.433	+3,7	2.933	+5,0
Sheep and goats	12.860	+1,6	888	—1,3	371	—2,1
Poultry (2)	161.200	+2,3	13.125	+2,3	2.893	+6,9
Rabbits (3)	—	—	3.495	+1,9	1.164	+2,9
Eggs (4)	—	—	11.760	+8,5	1.345	+1,0
Cows milk (5)	—	—	99.345	+0,4	5.554	+2,2
Sheep and goats milk (5)	—	—	5.796	+1,2	628	+6,0

(1) Including buffaloes.
(2) Laying hens, hens, turkeys, guinea fowl. *Source:* UNA.
(3) Including game.
(4) Production in millions.
(5) Production in 000 hl.; buffalo milk included with cows' milk.
(6) Live weight.

PRICES AND COSTS - INDEX NUMBERS (base 1980 = 100)





INTERMEDIATE INPUTS

Expenditure for the livestock sector represents the highest proportion of the total for intermediate inputs.
As compared with 1970 total expenditure for current goods and services grew in real terms by 70%; nevertheless the rate of growth slowed down during the 1980s.

INTERMEDIATE INPUTS BY MAIN TYPE

Type	Billion lire	%
Seeds	756	5,0
Fertilisers	1.849	12,1
Pesticides	949	6,2
Feed compounds (1)	8.616	56,7
Energy	1.545	10,1
Other goods and services	1.509	9,9
Total	15.224	100,0

(1) Including other expenditure for livestock.

FOREIGN TRADE

The agro-food balance of trade is permanently in deficit; nevertheless the extent to which export values cover those of imports has increased continuously since 1970 due to the relatively more rapid growth of exports.

THE AGRO-FOOD TRADE BALANCE (1) (billion lire at 1988 prices)

Years	Imports	Exports	Balance	Level of cover (2)	Level of exposure (3)
1970	17.176	5.769	—11.407	33,6	44,4
1980	24.790	8.969	—15.821	36,2	59,3
1988	28.781	11.510	—17.271	40,0	73,4

(1) Including all food products derived from agricultural or forestry activity, game and fish, fresh or industrially processed, as well as all products from the same sources not destined for human consumption.
(2) Percentage ratio of exports to imports.
(3) Percentage ratio between the sum of exports and imports and the value of final agricultural product.

FOREIGN TRADE BY MAIN CATEGORY OF AGRO-FOOD PRODUCT (billion lire)

Product group	Imports	Exports	Balance
CROPS	7.234	3.502	—3.732
Cereals	2.356	236	—2.120
Wheat	1.535	178	—1.357
Maize	506	42	— 464
Vegetables	433	778	+ 345
Fruit	1.081	1.932	+ 851
Citrus	40	112	+ 72
Coffee, tropical beverages	1.086	13	—1.073
Oilseeds	383	7	— 376
Uncured tobacco	259	134	— 125
Cotton	708	15	— 693
LIVESTOCK	4.376	63	—4.313
Live animals	2.461	25	—2.436
Milk	1.131	5	—1.126
FOREST PRODS.	1.108	67	—1.041
FISH and GAME	2.034	136	—1.898
Fresh and frozen fish	1.757	129	—1.628

Product group	Imports	Exports	Balance
INDUSTRIAL FOOD PRODUCTS	9.954	5.661	— 4.293
Flour and pasta	22	760	+ 738
Rice	29	377	+ 348
Sugar	154	162	+ 8
Confectionery	365	380	+ 15
Meat	4.103	836	— 3.267
Processed fish	662	99	— 563
Processed tomatoes	62	772	+ 710
Other processed vegetables	430	644	+ 214
Cheese and butter	1.768	493	— 1.275
Olive oil	652	285	— 367
Other oils and fats	300	116	— 184
WINE AND VERMOUTH	195	1.481	+ 1.286
OTHER BEVERAGES	543	243	— 300
OTHER PROCESSED AGRICULTURAL PROD.	3.337	357	— 2.980
TOTAL	28.781	11.510	—17.271

AGRICULTURAL CREDIT

Agricultural credit represents only a part of total credit requested by farmers who, to an ever-in-creasing degree, are turning to ordinary channels of credit. In 1988 agrarian credit erogated increased by 8.3% over 1987 even though demand for subsidised credit slowed down, decreasing from 62.3% of total credit in 1987 to 56.8% in 1988. The increase in credit for improvements was particularly noticeable (+31.7%) mainly because of non-subsidised loans covered in foreign currency; the increase in short-term loans for working capital and other was limited; credit for equipment was stationary.

AGRICULTURAL CREDIT - EROGATIONS

Type of credit	Billion lire	%	% subsidised to total credit
Working capital	10.963	63,9	59,2
Other short-term operations (1)	2.887	16,8	61,7
Equipment (2)	1.178	6,9	39,6
Farm and other improvements	2.119	12,4	47,5
Total	17.147	100,0	56,8

(1) Advances with agricultural produce as collateral, loans to agricultural bodies and associations.
(2) Purchase of livestock and machines.

Source: BANCA D'ITALIA.

AGRICULTURAL INVESTMENT

Despite some recovery in recent years, the trend in agricultural investment (i.e. in agriculture, forestry and fishing) appears uncertain: its share in total gross fixed investment is declining and it now represents a percentage of value-added lower than that at the beginning of the 1980s.

TRENDS IN AGRICULTURAL INVESTMENT 1980-1987 (Billion lire)

Years	Value at current prices	Value at constant 1980 prices	% of total gross fixed investment (at 1980 prices)	Agricultural investment: agricultural VA
1980	8.466	8.466	9,0	38,0
1981	9.641	8.012	8,8	35,7
1982	10.853	7.820	9,0	35,8
1983	12.605	8.123	9,5	34,3
1984	13.638	8.023	9,0	35,2
1985	13.902	7.494	8,3	32,7
1986	14.823	7.565	8,2	32,4
1987	16.048	7.717	7,8	31,9
1988	17.886	8.109	7,9	34,7

Source: ISTAT for the years 1980-1985; INEA estimates for 1986-1988.

MECHANISATION

Between 1970 and 1988 the national stock of agricultural machines more than doubled.

More widespread mechanisation has enabled the farmer to carry out operations with greater efficiency and punctuality and more productively. In the same period of time, it must be added, the amount of labour employed, in terms of work units, fell by 36%.

There was a marked increase in the use of all main categories of machines, and particularly for small motorised machines.

In the South the increase in mechanisation showed an increase even more pronunced than in the rest of the country for nearly all the main types of machinery except for combined harvesters.

THE STOCK OF AGRICULTURAL MACHINES AND CHANGES SINCE 1970 (*)

Type	North		Centre		South		Italy	
	N.	change%	N.	change%	N.	change%	N.	change%
Tractors (1)	772	86,0	270	173,6	325	205,9	1.367	120,5
Combined harvesters	24	67,2	10	171,6	11	119,9	45	98,2
Mowers and others motors (2)	538	33,7	205	131,5	490	272,1	1.233	98,0
Small agricult. machines	74	265,6	29	266,0	77	552,5	180	350,4
Other machines	184	33,1	87	58,8	227	75,2	498	54,4
Total	1.592	60,9	601	136,9	1.130	194,0	3.323	104,2

(*) Numbers in thousands at 31-12-1988.

(1) Including accessories.

(2) Motorcultivators and motorhoes.

Source: UNACOMA.

2

THE STRUCTURE OF ITALIAN AGRICULTURE

THE NUMBER OF FARMS

31.0% of farms are located in Northern regions, occupying an area equal to 37.2% of the national total; in Central Italy there are 16.3% of all farms, with 20.2% of the total area; in the South and Islands 52.7% of all farms occupy 42.6% of total farm area.

Whereas since 1970 the number of farms has not decreased markedly (—48,860 or 1.7%) the total agricultural land area changed considerably, losing altogether 1.9 million hectares. The decline was particularly strong in the South (—8.5%) where, in addition, the number of farms increased by about 67,000, and consequently average farm size fell considerably.

THE NUMBER OF FARMS AND AGRICULTURAL AREA (numbers in thousands)

Zone and Survey	N. farms	Area			
		Total		Agricultural (UAA)	
		Hectares	Avj. per farm (ha)	Hectares	Avj. per farm (ha)
NORTH					
1970	956,9	8.802,4	9,2	5.878,1	6,1
1985	867,3	8.087,0	9,3	5.388,7	6,2
CENTRE					
1970	470,1	4.712,9	10,0	3.030,5	6,4
1985	456,8	4.390,5	9,6	2.804,5	6,1
SOUTH					
1970	1.405,6	10.135,0	7,2	8.270,2	5,9
1985	1.472,0	9.270,2	6,3	7.407,4	5,0
ITALY					
1970	2.832,6	23.650,3	8,3	17.178,8	6,1
1985	2.796,1	21.747,7	7,8	15.600,6	5,6

Structural data are taken from the ISTAT Sample Survey of 1985 and consider farms in the EEC field of observation, more limited than the national survey.

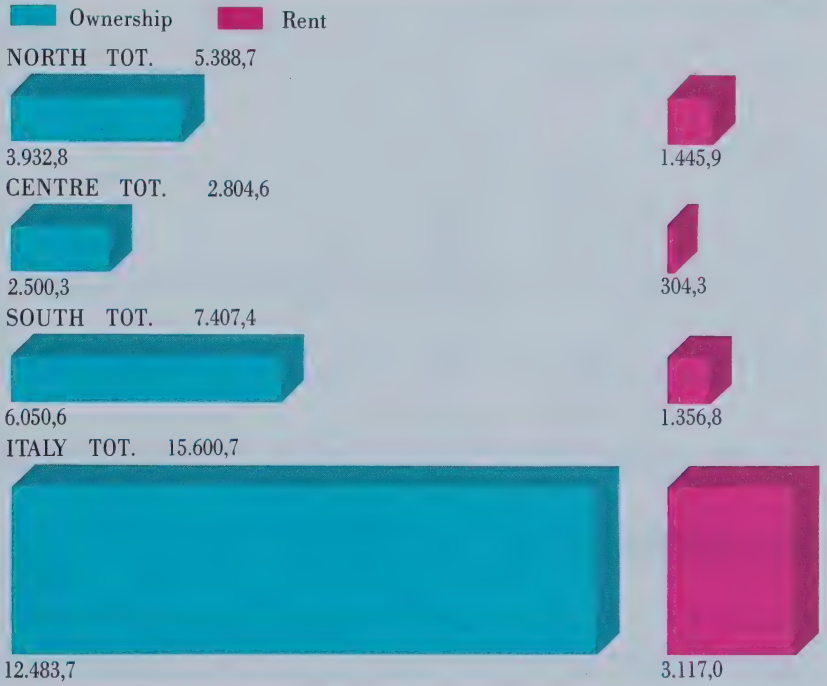
ACCESS TO AGRICULTURAL LAND IN USE

Considering the two traditional methods of access to land, ownership and renting, 4/5 of the utilised agricultural area (UAA) are farmed by owners. This form of access is more common in the Centre, amounting to 89.1%, whilst in the North it amounts to 73.0%.

TYPE OF ENTERPRISES

More than 95% of farms in Italy are owner-operated where the farmer and members of his family are directly involved in farm work. This form of enterprise is particularly common in the North where farms using exclusively family labour represent 87.5% of all those which are owner-operated.

UAA BY TYPE OF ACCESS (000 hectares)



OWNER-OPERATED HOLDINGS AND CORRESPONDING AREA (no.s and ha.s in thousands)

District	With exclusively family labour		With mainly family labour		With mainly non-family labour		Total		% of all farms
	No.s/Ha.s	%	No.s/Ha.s	%	No.s/Ha.s	%	No.s/Ha.s	%	
HOLDINGS									
North	732,5	87,5	88,4	10,5	16,6	2,0	837,5	100,0	96,2
Centre	377,5	88,5	33,6	7,9	15,4	3,6	426,5	100,0	93,3
South	1.131,4	80,2	200,2	14,2	79,2	5,6	1.410,8	100,0	95,6
Italy	2.241,4	83,8	322,2	12,0	111,2	4,2	2.674,8	100,0	95,5
TOTAL AREA									
North	4.271,1	73,3	1.046,3	18,0	508,1	8,7	5.825,5	100,0	72,0
Centre	1.978,6	76,0	335,1	12,9	288,6	11,1	2.602,3	100,0	59,3
South	4.771,9	66,0	1.592,6	22,0	865,3	12,0	7.229,8	100,0	78,0
Italy	11.021,6	70,4	2.974,0	19,0	1.662,0	10,6	15.657,6	100,0	72,0

FARM SIZE

More than three quarters of farms in Italy have an area of land utilised for agriculture of less than 5 hectares and one third of farms have less than 1 hectare; the latter group accounts for only 3% of utilised agricultural area whereas, in contrast, the largest 0.5% of farms cover more than one fifth of total UAA.

Since 1970 the larger farms have maintained their relative position with respect to the national total but farms of less than one hectare increased their share, by 1.4% and it is particularly high in the South of the country.

FARMS AND UTILISED AGRICULTURAL AREA BY SIZE OF UAA

Size group (UAA)	1970		1985			
			Italy		EEC 10	
	Farms	UAA	Farms	UAA	Farms	UAA
NUMBERS (000)						
Up to 0,99 hectares (1)	602,4	297,6	909,3	452,2	412,4	195,7
1 - 4,99	1.542,9	3.632,0	1.272,9	2.907,2	1.003,1	2.552,4
5 - 9,99	397,4	2.747,1	318,1	2.187,5	508,1	3.636.6
10 - 19,99	187,5	2.548,7	168,1	2.287,3	582,9	8.425,9
20 - 49,99	82,2	2.440,1	92,7	2.784,5	724,2	22.671,7
50 - 99,99	22,7	1.561,2	26,6	1.791,3	237,0	15.995,5
100 hectares and over	14,8	3.952,1	13,4	3.190,6	90,5	19.202,9
Total	2.849,9	17.178,8	2.801,1	15.600,6	3.558,2	72.680,7
PERCENT						
Up to 0,99 hectares (1)	21,2	1,7	32,5	2,9	11,6	0,3
1 - 4,99	54,1	21,1	45,4	18,6	28,2	3,5
5 - 9,99	14,0	16,0	11,4	14,0	14,3	5,0
10 - 19,99	6,6	14,8	6,0	14,7	16,4	11,6
20 - 49,99	2,9	14,2	3,3	17,8	20,3	31,2
50 - 99,99	0,8	9,1	0,9	11,5	6,7	22,0
100 hectares and over	0,5	23,0	0,5	20,5	2,5	26,4
Total	100,0	100,0	100,0	100,0	100,0	100,0

(1) Including farms without land.

UTILISATION OF FARM LAND

Cultivation of annual crops, tree crops, permanent meadows and pasture occupies 71.7% of the total area, whilst a further 20.3% is under woodland.

69.2% of farms cultivate annual crops which occupy 53.4% of UAA (mainly cereals, rotation forage and horticultural produce).

There are tree crops (mostly vineyards and olive groves) on almost all farms and these occupy about 2.8 million hectares (18.2% of UAA).

NO. OF FARMS AND AREA SOWN TO CERTAIN MAIN CROPS (thou

Crops	North
	No. farms
ANNUAL CROPS	693,0
Cereals	455,4
Soft wheat	188,5
Hard wheat	77,2
Maize	878,5
Sugar beet	44,7
Industrial crops	22,1
Outdoor horticultural crops (1)	110,5
Rotation forage	230,9
TREE CROPS (2)	461,4
Vineyards	377,2
Olive groves	35,5
Fruit and nuts	122,3
PERMANENT PASTURE	339,9
TOTAL UAA	866,5
CULTIVATED WOODLAND (3)	326,2
OTHER (4)	768,4
TOTAL AGRICULTURAL AREA	867,3

(1) Including garden plots. (2) Including chestnut groves. (3) Including poplar plantations.

farms and thousand hectares)

Area wn (ha)	Centre No. farms	Centre Area sown (ha)	South No. farms	South Area sown (ha)	Italy No. farms	Italy Area sown (ha)
3.159,8	353,0	1.715,3	887,9	3.460,1	1.933,9	8.335,2
1.829,3	240,8	938,8	570,9	2.140,0	1.267,1	4.908,1
502,1	144,8	398,6	153,0	163,3	486,4	1.064,0
72,6	37,9	221,4	383,8	1.567,5	438,9	1.861,5
323,4	137,7	101,0	52,1	95,8	1.068,3	520,2
177,4	15,6	43,9	13,4	34,7	73,7	256,0
75,0	10,8	52,5	48,8	59,1	81,7	186,6
72,6	108,3	50,8	300,2	196,1	519,0	319,5
936,9	162,9	522,1	213,3	602,3	607,1	2.061,3
553,2	345,5	490,2	1.124,0	1.795,1	1.930,9	2.838,5
295,5	258,5	205,7	613,9	594,7	1.249,6	1.095,9
23,2	196,1	207,5	638,2	725,8	869,8	956,5
196,6	50,1	44,9	255,6	272,0	428,0	513,5
1.675,7	117,2	599,0	250,9	2.152,2	708,0	4.426,9
5.388,7	456,8	2.804,5	1.472,0	7.407,4	2.795,3	15.600,6
1.814,9	125,4	1.284,6	159,2	1.309,0	610,8	4.408,5
883,4	358,0	301,4	800,4	553,8	1.926,8	1.738,6
8.087,0	456,8	4.390,5	1.472,0	9.270,2	2.796,1	21.747,7

) Agricultural area not utilised and other areas.

LIVESTOCK

The proportion of farms with livestock activities has declined steadily over the years and is now half that of ten years ago. In terms of livestock numbers there have been increases of varying intensity in all sectors except for equines. In the case of pig raising, the total herd reached more than 8 million head in 1985, an increase of 51.1% over the level of 1970. Sheep numbers, at 7.5 million head increased by 25.6%. As a result, the average size of livestock enterprise increased considerably: in the pig sector it increased three-fold, whilst in almost all other sectors the average number of head doubled.

FARMS WITH LIVESTOCK AND LIVESTOCK NUMBERS (thousands)

Type	1970			1985				
	Italy			Italy			EEC 10	
	Farms	Head		Farms	Head		Head	
		No.	Avj per farms		No.	Avj per farm	No.	Avj per farm
Cattle	939,5	8.701,4	9	458,2	8.711,8	19	70.316,3	42
Dairy cattle	604,4	2.861,2	5	298,6	2.782,3	9	21.530,7	20
Pigs	857,6	5.834,6	7	407,2	8.816,1	22	71.165,4	80
Sows	125,2	549,9	4	47,4	955,3	20	8.457,5	26
Sheep	211,0	5.986,6	28	163,0	7.521,8	46	60.380,4	109
Goats	124,0	857,1	7	87,3	1.025,4	12	5.419,8	14
Equines	443,3	533,1	1	87,7	204,1	2	948,3	3
Laying hens	1.304,6	43.012,8	33	692,1	60.823,0	88	264.636,0	151
Poultry	852,5	59.617,7	70	420,6	70.158,0	167	256.175,0	388

CATTLE AND PIG RAISING ENTERPRISES BY NUMBER OF HEAD (thousands)

Number of head	North		Centre		South		Italy		EEC 10
	Farms	Head	Farms	Head	Farms	Head	Farms	Head	Farms
CATTLE									
1 - 2	35,5	58,3	19,7	31,6	30,6	51,0	85,8	140,9	91,8
3 - 9	87,3	474,7	34,3	180,2	65,9	348,9	187,5	1.003,8	310,1
10 - 19	45,5	617,5	12,0	160,8	28,8	383,4	86,3	1.161,7	292,2
20 - 49	38,8	1.202,9	7,4	212,5	17,2	500,4	63,4	1.915,8	490,5
50 and over	28,3	3.729,9	2,2	286,3	4,7	473,4	35,2	4.489,6	490,3
Total	235,4	6.083,3	75,6	871,4	147,2	1.757,1	458,2	8.711,8	1.674,9
PIGS									
1 - 2	81,8	109,7	79,8	114,3	145,0	197,5	306,6	421,5	322,0
3 - 9	11,5	45,7	24,9	109,7	31,3	134,7	67,8	290,1	173,8
10 - 49	4,6	92,1	6,7	133,9	10,2	183,5	21,4	409,5	181,6
50 and over	6,4	6.262,9	2,7	964,2	2,2	467,9	11,4	7.695,0	218,4
Total	104,3	6.510,4	114,1	1.322,1	188,7	983,6	407,2	8.816,1	895,8

SPECIALISATION IN PRODUCTION AND THE ECONOMIC SIZE OF FARM

More than three quarters of farms in Italy are specialised in production. The latest structural surveys of 1975 and 1985 show that the most common form of specialisation is in crops, particularly permanent crops, with a 5.6% increase in the number of farms specialising in olive cultivation.

The number of farms with livestock (including specialised and mixed livestock) decreased by 2.2%.

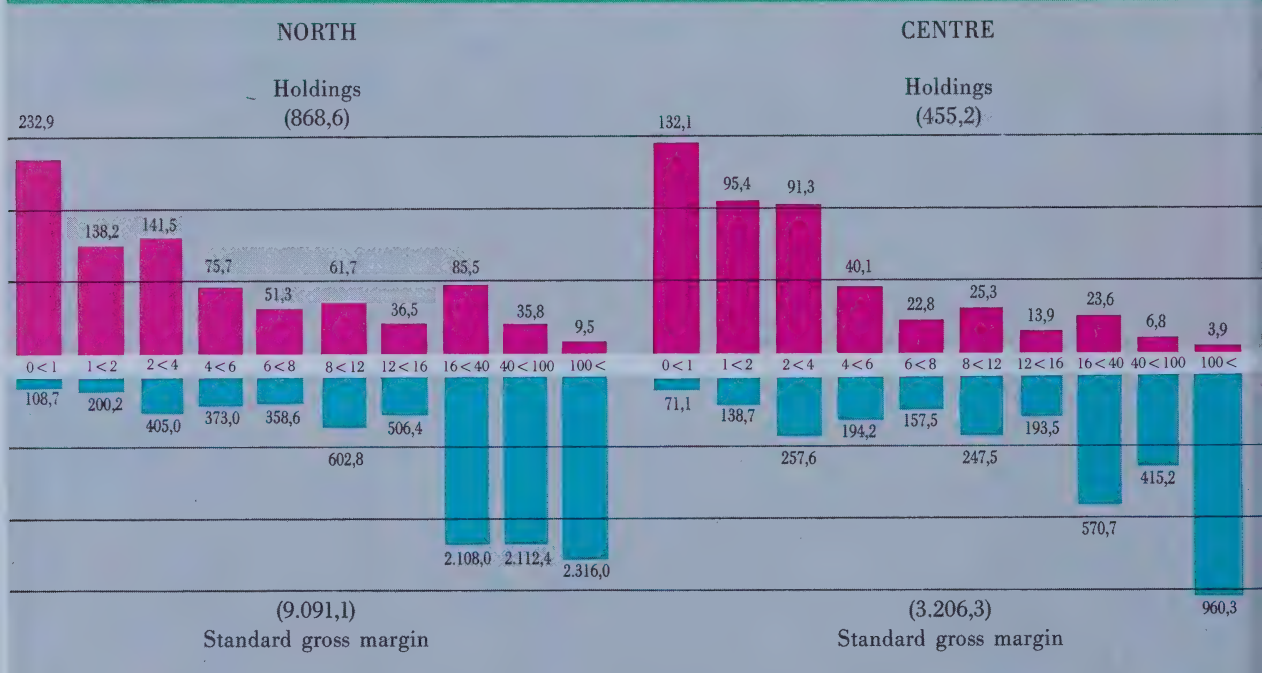
As far as economic size is concerned, 77% of farms reach no higher than 6 European Size Units, and account for 19.5% of total national standard gross margin. In contrast, 61.4% of standard gross margin comes from only 8.8% of the largest farms.

DISTRIBUTION OF FARMS BY TYPE OF FARMING (TF) (thousands)

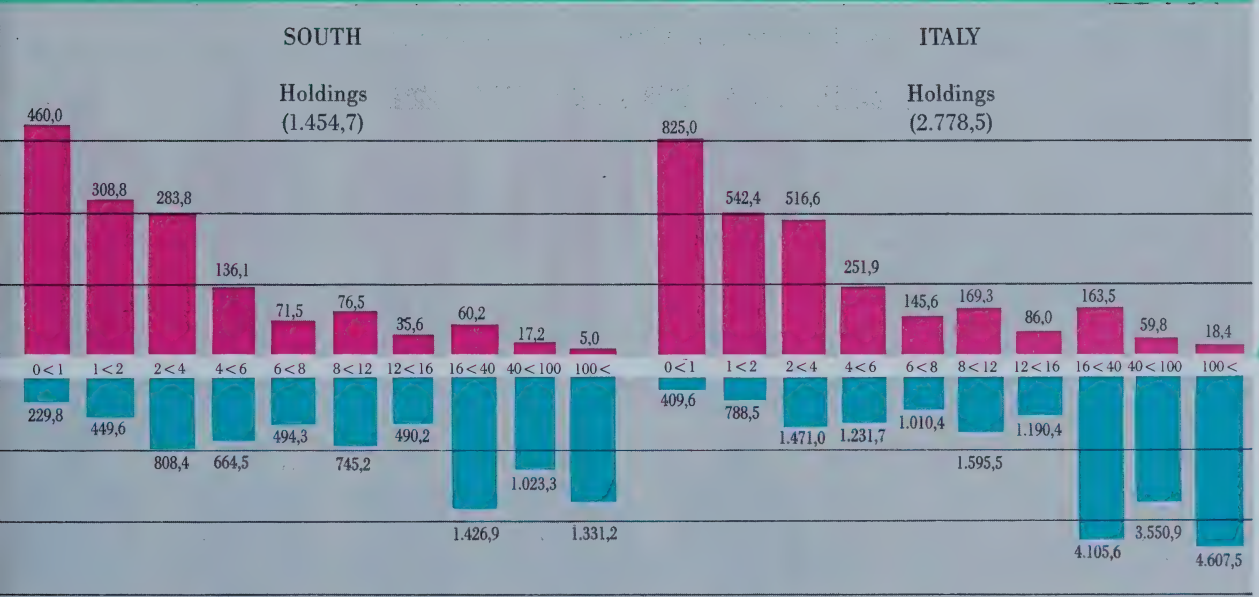
TF	1975	
	Farms	%
SPECIALISED FARMS:	1.783,7	67,0
Annual crops	646,0	24,3
Cereals	248,6	9,4
Other	397,4	14,9
Horticulture and Floriculture	29,8	1,1
Permanent crops	815,8	30,6
Grapes	280,4	10,5
Olives	118,4	4,4
Other mixed permanent crops	417,0	15,7
Herbivorous animals	269,6	10,1
Dairy cattle	106,0	4,0
Beef cattle	21,8	0,8
Dual purpose cattle	46,4	1,7
Other	95,4	3,6
Granivorous animals	22,5	0,9
MIXED FARMS:	878,2	33,0
Mixed crops	454,9	17,1
Mixed livestock	152,0	5,7
Crops and livestock	271,3	10,2
Annual crops and herbivorous animals	179,9	6,8
TOTAL	2.661,9	100,0

TF	1985			
	Italy		EEC 10	
	Farms	%	Farms	%
SPECIALISED FARMS:	2.173,3	78,2	2.693,2	76,0
Annual crops	735,1	26,5	702,9	19,8
Cereals	305,2	11,0	255,4	7,2
Other	429,9	15,5	447,5	12,6
Horticulture and Floriculture	45,1	1,6	34,9	2,7
Permanent crops	1.073,9	38,6	605,4	17,1
Grapes	321,5	11,6	198,1	5,6
Olives	277,9	10,0	159,6	4,5
Other mixed permanent crops	474,5	17,0	247,7	7,0
Herbivorous animals	302,1	10,9	1.219,8	34,4
Dairy cattle	100,7	3,6	560,2	15,8
Beef cattle	27,9	1,0	248,3	7,0
Dual purpose cattle	35,7	1,3	94,5	2,7
Other	137,8	5,0	316,9	8,9
Granivorous animals	17,1	0,6	70,2	2,0
MIXED FARMS:	605,2	21,8	850,5	24,0
Mixed crops	367,1	13,2	253,6	7,2
Mixed livestock	73,9	2,7	201,7	5,7
Crops and livestock	164,2	5,9	395,2	11,1
Annual crops and herbivorous animals	98,7	3,6	275,0	7,8
TOTAL	2.778,5	100,0	3.543,7	100,0

HOLDINGS AND STANDARD GROSS MARGIN BY CLASS OF EUROPEAN SIZE UNIT (ESU) (*)



(*) 1 ESU = lire 1,443.524


SOUTH
Holdings
(1.454,7)
460,0
308,8
283,8
136,1
71,5
76,5
35,6
60,2
17,2
5,0
0<1
1<2
2<4
4<6
6<8
8<12
12<16
16<40
40<100
100<
229,8
449,6
808,4
664,5
494,3
745,2
490,2
1.426,9
1.023,3
1.331,2
(7.663,7)
Standard gross margin
ITALY
Holdings
(2.778,5)
825,0
542,4
516,6
251,9
145,6
169,3
86,0
163,5
59,8
18,4
0<1
1<2
2<4
4<6
6<8
8<12
12<16
16<40
40<100
100<
409,6
788,5
1.471,0
1.231,7
1.010,4
1.595,5
1.190,4
4.105,6
3.550,9
4.607,5
(19.961,1)
Standard gross margin

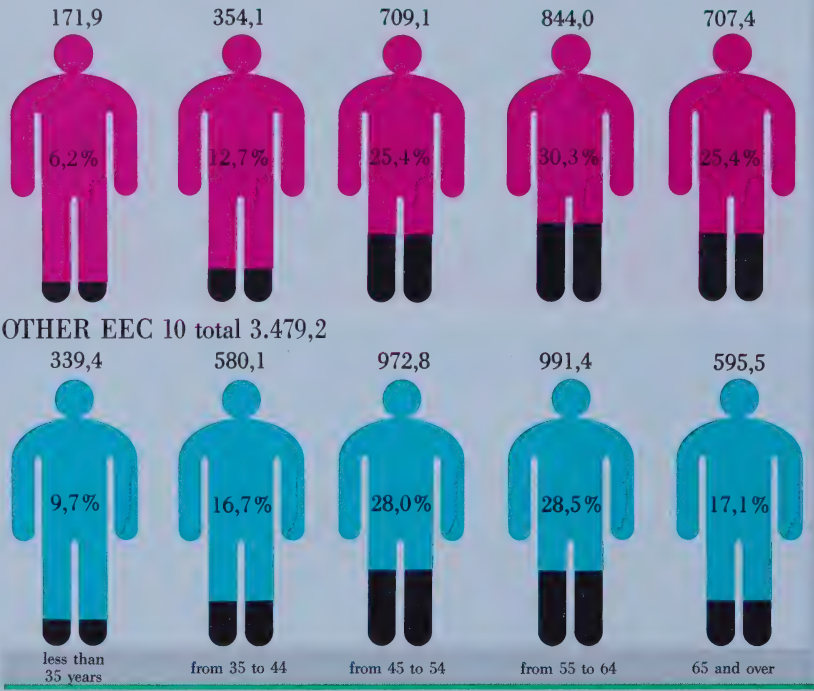
LABOUR

In 1985 more than 55% of farms were run by persons over 55 years of age. In contrast farm entrepreneurs younger than 35 years old were only 6.2% of the total.

Over time the average age of farm entrepreneurs has been slowly but steadily increasing: from 1975 to 1985 entrepreneurs younger than 45 years old fell from 23.1% to 18.9% of the total. In 1985 73.8% of entrepreneurs worked exclusively on their own farm, whereas 22.6% followed off-the-farm employment as the main activity.

(*) Data refer to individual (not company) entrepreneurs.

DISTRIBUTION OF FARMS BY AGE OF ENTREPRENEUR (thousands)



DISTRIBUTION OF FARM ENTREPRENEURS BY FARM AND OFF-FARM EMPLOYMENT (*)

District	Total	Exclusively on-farm	Mainly on-farm			Mainly off-farm		
			Total	with employment on other farms	With employment in other sectors	Total	On other farms	In other sectors
NUMBERS								
North	862,9	661,5	26,6	7,7	15,2	174,8	12,0	103,5
Centre	453,2	316,8	17,3	4,4	9,0	119,1	9,5	79,3
South	1.470,4	1.078,8	57,1	30,5	23,0	334,5	95,3	199,5
Italy	2.786,5	2.057,1	101,0	42,6	47,2	628,4	116,8	382,3
% DISTRIBUTION BETWEEN DISTRICTS								
North	31,0	32,2	26,3	18,0	32,2	27,8	10,2	27,1
Centre	16,3	15,4	17,2	10,4	19,0	19,0	8,2	20,7
South	52,7	52,4	56,5	71,6	48,8	53,2	81,6	52,2
Italy	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0
% DISTRIBUTION BETWEEN TYPES OF EMPLOYMENT								
North	100,0	76,7	3,0	0,9	1,8	20,3	1,4	12,0
Centre	100,0	69,9	3,8	1,0	2,0	26,3	2,1	17,5
South	100,0	73,4	3,9	2,1	1,6	22,7	6,5	13,6
Italy	100,0	73,8	3,6	1,5	1,7	22,6	4,2	13,7

NUMBER OF WORK UNITS BY CLASS OF EUROPEAN SIZE UNIT (thousands)

Class of size unit (ESU) (*)	North		Centre		South		Italy		EEC 10	
	WU	%	WU	%	WU	%	WU	%	WU	%
Up to 1,99	128,2	15,9	85,5	23,0	235,7	25,0	449,4	21,2	413,9	8,8
2 - 3,99	95,5	11,8	65,8	17,7	173,7	18,4	335,0	15,8	384,4	8,2
4 - 5,99	72,5	9,0	42,0	11,3	118,3	12,6	232,8	11,0	330,0	7,0
6 - 7,99	54,5	6,7	27,0	7,3	73,7	7,8	155,2	7,3	281,3	6,0
8 - 11,99	80,9	10,0	35,1	9,4	94,3	10,0	210,3	9,9	453,5	9,7
12 - 15,99	56,7	7,0	24,0	6,4	53,4	5,7	134,1	6,3	353,8	7,5
16 - 39,99	167,6	20,7	49,8	13,4	113,2	12,0	330,6	15,6	1.301,5	27,7
40 - 99,99	99,0	12,2	19,1	5,1	51,1	5,4	169,2	8,0	798,0	17,0
100 and over	53,5	6,6	23,5	6,3	28,4	3,0	105,4	5,0	381,0	8,1
Total	808,4	100,0	371,8	100,0	941,8	100,0	2.122,0	100,0	4.697,4	100,0

(*) 1 ESU = Lire 1,443.524.

FORESTS

Information about the size and characteristics of forests in Italy is taken from the National Inventory of Forests carried out by the Ministry for Agriculture and Forests in 1985.

The total area under forests, 8.7 million hectares, occupies 28.8% of total national land area.

70.9% of the total forest area is made up of coppice and high forest, 3.3% of plantations for intensive non-timber production (chestnuts, cork) and as much as 25.8% of particular forms of vegetation.

The latter, consisting mainly of shrubland, cliff and coastal vegetation, are particularly important from an environmental point of view and, in the future, from the point of view of forest development.

Deciduous trees are predominant, occupying 80% of forest area. About 60% of Italian forests are in a healthy state.

FOREST AREA (000 hectares)

Altitude (metres above sea level)	North	Centre	South	Italy
Up to 500	849	966	1.248	3.063
501-1,000	1.183	813	1.248	3.244
1,001-1,500	867	205	500	1.572
Over 1,500	672	26	98	796
Total	3.571	2.010	3.094	8.675

FOREST AREA BY SPECIES OF TREE AND BY OWNERSHIP (000 hectares)

	North	Centre	South	Italy
High forests	1.178	231	770	2.179
Red spruce	263	0	1	264
White pine	128	26	75	229
Beach	30	39	155	224
Coniferous	292	13	21	326
Mixed, mainly coniferous	111	34	72	217
Deciduous	103	26	156	285
Coppice	1.148	1.368	857	3.673
Chestnut	196	108	71	375
Beech	155	83	93	331
Turkey oak	26	123	60	209
Other oak	105	261	173	539
Mixed	913	666	342	1.921
Non-timber production	136	28	125	289
Special types of vegetation	662	295	1.204	2.161
Other	147	87	138	372
Total	3.571	2.010	3.094	8.675
Publicly owned	1.199	506	1.240	2.945
Privately owned	2.372	1.504	1.854	5.730

3

THE LEGISLATIVE & ADMINISTRATIVE FRAMEWORK

THE ROLES OF CENTRAL AND REGIONAL ADMINISTRATIVES BODIES

The framework of authority as regards agriculture is regulated by the following laws:

- **Law no. 281 of 16th May 1970** and the subsequent **Presidential decree no. 11 of 15th January 1972**
- **Law no. 382 of 22nd July 1975** and the subsequent **Presidential decree no. 616 of 24th July 1977**

Both transfer to the Regional authorities the greater part of responsability for agriculture.

Thus all the measures most directly related to production have become subject to Regional intervention, including:

- Crop production and livestock rearing
- Collection, processing and distribution of produce
- Extension and professional training

As stated in article 4 of the Presidential decree 616/77, «the Central Government shall excercise the functions of guiding and coordinating ... and, also for those areas of responsability transferred or delegated, functions concerning international relations, those with the European Economic Community, national defence and public security».
In particular, in agriculture, the main responsabilities of the Central authorities concern:

- research, experimentation and information of national interest
- measures of national interest for regulating agricultural markets
- guarantee of security in supplies
- the organisation of international trade
- the fund for national solidarity in case of catastrophe or adverse climatic conditions.

In the process of national planning, for the purpose of carrying out policies for production, agricultural markets and food, the Central authorities decide:

- the orientation of production and objectives
- areas of the country to be given preference
- maximum levels for incentives
- measures for implementing market policies
- general guidelines for implementing EEC regulations and directives
- financial coordination between regional and national intervention measures as regards markets.

PLANNING AND THE PRINCIPAL LEGISLATION GOVERNING INTERVENTION

THE NATIONAL PLAN FOR AGRICULTURE

Planning in the Italian agricultural sector for the five year period 1986-1990 is governed by the **National Plan for Agriculture** drawn up by the Ministry for Agriculture and Forests in accordance with its responsabilities for guiding and coordinating the sector.
The National Plan for Agriculture has the following objectives:

CENTRAL OBJECTIVE

- Support to and development of agricultural incomes

This objective is to be pursued by improving the efficiency of the farm enterprise in a market-orientated agricultural sector designed to make the maximum contribution to the stable economic growth of the nation.

CONDITIONING OBJECTIVES

- protection of employment in agriculture
- protection of the environment and hydro-geological stability
- limitation of the agro-food trade deficit
- the pursuit of corrective measures to attenuate the disparities between the South and the rest of the nation

The Plan is made up of a set of sub-programmes.
These are:

AN OUTLINE PLAN

approved by the CIPAA (Interministerial Commitee for Food and Agricultural Policy) on 1st August 1985.

SECTORIAL PLANS

— olives and olive oil
— grapes and wine
— sheep and goats

to be approved by the CIPE (Interministerial Committee for Economic Planning)

ACTION PLANS

— against plant pests and diseases
— against low fertility rates

The possibility of introducing changes is foreseen within the structure of the Plan.

The first up-dating of the Outline Plan was approved by the CIPE on 23rd April 1987.

The National Plan for Agriculture reconciles objectives and measures in national policy with those of Community policy and, both in analytical terms and with regard to the future, emphasises the importance of a synergy of initiatives. In fact, the greater part of intervention measures in Italy are governed by **EEC Regulations** the most important of which are illustrated in the following table

THE MAIN REGULATIONS OF THE EUROPEAN ECONONOMIC COMMUNITY

Regulation	Change	Title
— REG. 797/85	*modified by Reg. 1760/87*	Improving the efficiency of agrarian structures
from which follow:		
REG. 1094/88		Retirement of land from agricultural production
REG. 1096/88		Encouraging retirement from agricultural activities
REG. 4115/88		Extensivisation of production
— REG. 270/79	*modified by Reg. 1760/87*	Development of agricultural extension and information services in Italy
— REG. 496/80	*modified by Reg. 1442/88*	Concession of premiums in the 1988-89 - 1995-96 crop years for the destruction of vineyards
— REG. 355/77	*modified by Reg. 1932/84 and Reg. 1760/87*	Improvement of conditions for marketing and processing agricultural produce
— REG. 1401/86		The improvement of agriculture in certain less-favoured areas in the north of Italy
— REG. 2088/85		Integrated Mediterranean Programmes
— REG. 2052/88		The emission of structural funds, their effectiveness and the coordination of these measures with those financed by the European Investment Bank and other existing sources of finance.

LAW 752/86

The legal instrument governing finance for the National Plan for Agriculture is **law no. 752 of 8th November 1986**: «The law for expenditure over several years for measures planned in the agricultural sector».

As foreseen in the Outline Plan, this law provides for financing for measures undertaken by the Central Government and by the Regions and for Community Regulations in operation, authorising overall expenditure for the five-year period 1986-1990 of 16,500 billion lire and stipulating allocations year by year.

In reponse to proposals by the Ministry for Agriculture and Forests, each year the CIPE approves the deliberations through which the National Plan for Agriculure is implemented and provides for the measures foreseen by the Plan using the financial means made available through the law 752/86.

FINANCE EROGATED UNDER LAW 752/86

CIPE Deliberation	Allocation (billion lire)
17-12-1986	2.765
23- 4-1987	2.993
14- 6-1988	3.250
2- 5-1989	3.292

OTHER NATIONAL LAWS

Law no. 64 of 1st March 1986

«Regulation of special intervention in Southern Italy».

The three year programme which followed the emanation of the law provides for specific measures in agriculture as regards development of the livestock sector, of typically Mediterranean crops and of productive forestry. The law 64/86 is implemented by the Department for Special Intervention in Southern Italy (MISM). As regards the agricultural sector, in April 1989 the Minister for Southern Italy and the Minister of Agriculture agreed on an outline programme to regulate the measures by which the two Ministries will harmonise initiatives for agriculture.

Law no. 44 of 28th February 1986

«Special measures for encouraging and developing entrepreneurial capacity amongst young people in Southern Italy».

Law no. 181 of 26th 1982

«Arrangements for drawing up the annual and pluri-annual State budget».

This established the Fund for Investment and Employment, implemented by the Ministry for the Budget. For agricultural projects a consultative liaison committee was established within the Ministry for Agriculture and Forests.

PRINCIPAL ORGANISATIONS IN THE AGRICULTURAL SECTOR

PUBLIC INSTITUTIONS

- Camera dei Deputati
  XIII Commissione parlamentare per l'agricoltura
- Senato della Repubblica
  IX Commissione parlamentare per l'agricoltura e la produzione agro-alimentare
- Ministero dell'Agricoltura e delle Foreste

Public bodies controlled by MAF

- Azienda di Stato per gli Interventi nel Mercato Agricolo - AIMA
- Gestione ex Aziende di Stato per le Foreste Demaniali
- Lab. Centrale di Idrobiologia
- Ufficio Centrale di Ecologia Agraria e Difesa delle Piante colpite dalle avversità meteoriche - UCEA
- Ufficio Enologico

Public bodies supervised by MAF

- AGECONTROL
- Cassa per la Formazione della Proprietà Contadina
- Ente Nazionale Cavallo Italiano ENCI
- Ente Nazionale Corse al Trotto ENCAT
- Ente Nazionale delle Sementi Elette - ENSE
- Ente Risi
- Istituti di Ricerca e Sperimentazione Agraria
- Istituto Nazionale della Nutrizione INN
- Istituto Nazionale di Biologia della Selvaggina
- Istituto Nazionale di Economia Agraria - INEA
- Istituto per Studi e Ricerche sul Mercato Agricolo - ISMEA
- Jockey Club Italiano
- Risanamento Agro Industriale Zuccheri s.p.a. - RIBS
- Società degli Steeple Chases d'Italia
- Unione Nazionale Incremento Razze Equine - UNIRE

MINISTRY FOR AGRICULTU

Cabinet of the Minister	Consultative Administration
Cabinet Office Questions Office Office for Foreign Relations Press Office	Supreme Council for Agriculture and Forests

Secretariat of the Minister Secretariat of th Under-Secretaries

Central Administration

- Division of General Affairs, Inspectorates, Legislative Coordination and Personnel
- Division of Agricultural Production
- Division for the Economic Protection of Agricultural Products
- Central Inspectorate for the Repression of Fraud
- Division for the Economy of Mountain Areas and for Forests
- Director General for Agricultual Cooperation and Agricultural Credit
- Director for Agro-industrial Affairs and Structural Measures

Regional Departments of Agriculture

- Ispettorati Provinciali
- Enti di Sviluppo Agricolo
- Osservatori per le malattie delle piante

OTHER BODIES

Principal public bodies

- Enti di Ricerca di carattere nazionale
  CNR
  ENEA
  ISTAT
- Camere di Commercio, Industria, Artigianato e Agricoltura
- Consorzi di Bonifica, di Irrigazione e di miglioramento fondiario
- Istituti di Credito Agrario
- Centri Interregionali di Formazione e Divulgazione Agricola
  CIFDA

Principal trade unions, producers' associations and cooperatives

- Confederazione Nazionale dei Coltivatori Diretti
  CCDD
- Confederazione Generale dell'Agricoltura Italiana
- Confederazione Italiana Coltivatori
- Federbraccianti
  CGIL
- Unione Generale Coltivatori
  CISL
- Unione Italiana Salariati e Braccianti Agricoli
  UIL
- Confederazione Cooperative Italiane
  CONFCOOPERATIVE
- Associazione Nazionale delle Cooperative e Mutue
  ANCA LEGA
- Associazione Generale Cooperazione Italiana
- Associazioni ed Unioni dei Produttori
- Associazione Italiana Allevatori e Associazioni Provinciali
- Federconsorzi e Sistema dei Consorzi Agrari Provinciali
- Unione Nazionale Costruttori Macchine Agricole
  UNACOMA

APPENDIX

4

GLOSSARY

GPD

Gross Domestic Product

Is the outcome of the productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.

It does not include the value of intermediate goods and services.

UAA

Utilised Agricultural Area

Is made up of all arable land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

Total farm area

In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.

It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Access to UAA

The relationship between enterprise and farm capital. It can be:

- ownership
- rent

Type of enterprise

The relationship between enterprise and labour. It can be:

- owner operator
- farmer with hired labour
- share-tenant
- other.

VA

Value Added

Is the sum of the difference between the value of production of goods and services from individual productive sectors and the value of intermediate goods and services used up in the period specified. It coincides with the sum of the remuneration of factors of production and of depreciation in each sector.

Value added **at factor cost**, as distinct from that **at market prices**, includes any subsidies erogated by the public administration to the different sectors.

VFO

The Value of Final Output

Is the value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share re-used on the holding as a means of production.

Intermediate agricultural inputs

Expenditure on intermediate agricultural inputs is that for seed, fertilisers,

pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Production subsidies
Premiums and payments erogated by public bodies in favour of the agricultural sector.

WU

Work Unit
Is equivalent to the labour input of a full-time worker for one year.

SGM
Standard Gross Margin
This is a parameter determined for each productive activity by the difference between the value of final product and the sum of certain specific costs (seed, fertiliser, pesticides, feed stuffs, forage, etc.), excluding those for labour and machinery. Gross margins calculated in this way are definied as «standard» in that the value of final product and cost are calculated on a three-year average, with reference to the altimetric zone of each region. The SGM are expressed in Europeen Units of Account (ECU) and up-dated by INEA when surveys of farm structure or the agricultural census of ISTAT take place.

TF

Type of Farming
The classification of farms by type of farming is based on determination of the economic importance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located. The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

ESU

European Size Unit
Is given by the sum of the SGM of the productive activities of the farm.
Size is measured in ESU and each Unit, for 1985, is equal to 1100 ECU (1 ECU = 1,312.2945 lire).
Thus a holding with a total SGM of 7,850 ECU has an economic size of 7.13 ESU

USEFUL ADDRESSES

MINISTERO DELL'AGRICOLTURA E DELLE FORESTE
Roma - via XX Settembre 20
tel. 06/4665

REGIONAL DEPTS. OF AGRICULTURE

Abruzzo - *Pescara - Il Dipartimento*
via Catullo 17
tel. 085/63941

Basilicata - *Potenza*
via Anzio 44
tel. 0971/45991-45992

Calabria - *Catanzaro*
viale De Filippis 276
tel. 0961/53957

Campania - *Napoli*
via Oberdan 32
tel. 081/7812111

Emilia Romagna - *Bologna*
via Aldo Moro 38
tel. 051/283111-283516

Friuli Venezia Giulia - *Udine*
via Percoto 16
tel. 0432/501054-293954

Lazio - *Roma*
via Rosa Raimondi Garibaldi 7
tel. 06/5133490-5133703

Liguria - *Genova*
via Fieschi 15
tel. 010/54851

Lombardia - *Milano*
piazza IV Novembre 5
tel. 02/67651

Marche - *Ancona*
corso Mazzini 148
tel. 071/204690

Molise - *Campobasso*
via Sauro 1,
tel. 0874/9491

Piemonte - *Torino*
corso Stati Uniti 21
tel. 011/57171

Puglia - *Bari*
lungomare Nazario Sauro 1
tel. 080/401111

Sardegna - *Cagliari*
via Pessagno
tel. 070/302901-305293

Sicilia - *Palermo*
viale Regione Siciliana,
ang. via Leonardo da Vinci,
tel. 091/6961111-379111

Toscana - *Firenze*
via Di Novoli 26
tel. 055/439311

Trentino Alto Adige:
Provincia Autonoma di Trento
Trento - Località Melta 112
tel. 0461/895920

Provincia Autonoma di Bolzano
Bolzano - via Brennero 6
tel. 0471/995000

Umbria - *Perugia*
Centro Direzionale di Fontivegge
tel. 075/6961

Valle d'Aosta - *Aosta*
piazza Deffeyes
tel. 0165/40100

Veneto - *Mestre*
via Torino 110
tel. 041/5495411

NATIONAL RESEARCH BODIES FOR AGRICULTURE

CNR - *Roma*
piazzale Aldo Moro 1
tel. 06/49931

ENEA - *Roma*
viale Regina Margherita 125
tel. 06/85281

INEA - *Roma*
via Barberini 36
tel. 06/4744261-2-3

ISTAT - *Roma*
via Balbo 16
tel. 06/46731

ISMEA - *Roma*
via Nomentana 183
tel. 06/844-1010

INN - *Roma*
via Ardeatina 546
tel. 06/5032412

Istituto Nazionale di Biologia della Selvaggina
Ozzano Emilia (BO)
via S. Guelfi 23/A
tel. 051/798746

AGRICULTURAL RESEARCH INSTITUTES

Ist. Sper. Agronomico
Bari - via Celso Ulpiani 5
tel. 080/221558, 366922

Ist. Sper. per l'Agrumicoltura
Acireale (CT) - corso Savoia 190
tel. 095/891555, 891065

Ist. Sper. per l'Assestamento Forestale e l'Apicoltura
Trento (Villazzano) - via U. Giordano 8
tel. 0461/920578

Ist. Sper. per la Cerealicoltura
Roma - via Cassia 176
tel. 06/3285705

Ist. Sper. per le Colture Foraggere
Lodi (MI) - viale Piacenza 25
tel. 0371/31838

Ist. Sper. per le Colture Industriali
Bologna - via di Corticella 133
tel. 051/371157

Ist. Sper. per la Elaiotecnica
Pescara - via Cesare Battisti 229
tel. 085/95212

Ist. Sper. per l'Enologia
Asti - via Pietro Micca 35
tel. 0141/55205

Ist. Sper. per la Floricoltura
Sanremo (IM) - corso degli Inglesi 508
tel. 0184/884944

Ist. Sper. per la Frutticoltura
Roma (Ciampino) - via Fioranello 52
tel. 06/7240098

Ist. Sper. Lattiero Caseario
Lodi (MI) - via A. Lombardo 14
tel. 0371/32523, 30654

Ist. Sper. per la Meccanizzazione Agricola
Monterotondo (Roma)
via della Pascolare 16
(via Salaria km 29,200)
tel. 06/9006511

Ist. Sper. per la Nutrizione delle Piante
Roma - via della Navicella 2
tel. 06/736980

Ist. Sper. per l'Olivicoltura
Cosenza - via Silvio Pellico 50
tel. 0984/861959, 3861960

Ist. Sper. per l'Orticoltura
Pontecagnano (SA)
via Cavalleggeri 25
tel. 089/381252, 381293

Ist. Sper. per la Patologia Vegetale
Roma - via Carlo G. Bertero 22
tel. 06/8274218

Ist. Sper. per la Selvicoltura
Arezzo - via S. Margherita 80
tel. 0575/353021-2

Ist. Sper. per lo Studio e la Difesa del Suolo
Firenze - piazza D'Azeglio 30
tel. 055/2477242-3-4

Ist. Sper. per il Tabacco
Scafati (SA) - via Vitiello 66
tel. 081/8631141

Ist. Sper. per la Valorizzazione Tecnologica dei Prodotti Agricoli
Milano - via G. Venezian 26
tel. 02/2365502, 2364004

Ist. Sper. per la Viticoltura
Conegliano (TV) - via 28 Aprile 26
tel. 0438/61625, 61665

Ist. Sper. per la Zoologia Agraria
Firenze (Cascine del Riccio)
via Lanciola 12/A
tel. 055/209184

Ist. Sper. per la Zootecnia
Roma - via O. Panvinio 11
tel. 06/8394641

FARMERS' ORGANISATIONS, TRADE UNIONS AND PRODUCERS' ASSOCIATIONS

Confederazione Nazionale Coltivatori Diretti
Roma - via XXIV Maggio 43
tel. 06/46821

Confederazione Generale dell'Agricoltura
Roma - corso Vittorio Emanuele 101
tel. 06/65121

Confederazione Italiana Coltivatori
Roma - via Fortuny 20
tel. 06/3969931

Federbraccianti CGIL
Roma - via L. Sera 31
tel. 06/55431

Unione Generale Coltivatori CISL
Roma - via Tevere 20
tel. 06/862857

Unione Italiana Mezzadri e Coltivatori UIME
Roma - via XX Settembre 118
tel. 06/4810911

Unione Italiana Salariati e Braccianti Agricoli UIL
Roma - via Sallustio 15
tel. 06/465649

Associazione Italiana Allevatori AIA
Roma - via Tomassetti 9
tel. 06/859541-2-3-4-5

Ente Nazionale Risi
Milano - piazza Pio XI 1
tel. 02/874153

Unione Nazionale Associazioni Coltivatori Olivicoli
UNASCO
Roma - via Tevere 20
tel. 06/868609 - 868692

Unione Nazionale Associazioni Cerealicoltori e Semi Oleaginosi
U.NA.CE.
Roma - via Isonzo 20
tel. 06/8443285-8443483

Unione Nazionale Associazioni Coltivatori Ortofrutticoli e Agrumari
U.NA.CO.A.
Roma - via Tevere 20

Unione Italiana Associazioni Produttori Frumento
UIAPROF
Roma - via Alessandria 199
tel. 06/868272

Unione Italiana Associazioni Produttori Ortofrutticoli e Agrumari
UIAPOA
Roma - via Alessandria 199
tel. 06/866272

Unione Nazionale Associazioni Produttori Ortofrutticoli
UNAPRO
Roma - via Torino 135
tel. 06/4655764

Unione Nazionale Associazioni tra Produttori Ortofrutticoli e Agrumari e della Frutta Secca
UNAPOA
Roma - via Aureliana 63
tel. 06/4755371

Unione Nazionale Associazioni Produttori di Tabacco
UNATA
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale Associazioni Produttori Florovivaisti
UNAFLOR
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale Associazioni Produttori Riso
UNARISO
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale Associazioni Produttori Patate
UNAPA
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale Associazioni Produttori Vitivinicoli
UNAVINI
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Tabacchicoltori Italiani
UTI
Roma - via Curtatone 3

Unione Nazionale Associazioni Produttori Olive
UNAPROL
Roma - via di Villa Sacchetti 21
tel. 06/803651

Consorzio Nazionale degli Olivicoltori
CNO
Roma - via Alessandria 199
tel. 06/869363

Associazione Nazionale delle Cooperative Agricole
ANCA LEGA
Roma - via Guattani 13
tel. 06/844391

Confederazione Cooperative Italiane
CONFCOOPERATIVE
Roma - Borgo S. Spirito 78
tel. 06/650861

Associazione Generale delle Cooperative Italiane
Roma - viale Somalia 164
tel. 06/8313753

Unione Nazionale Cooperative Italiane
UNCI
Roma - via S. Sotero 32
tel. 06/6384294

Union Camere
Roma - piazza Sallustio 21
tel. 06/47041

Federazione Italiana dei Consorzi Agrari
Roma - via Curtatone 3
tel. 06/46641

Unione Nazionale Associazioni Zootecniche
U.NA.ZOO.
Roma - via Isonzo 20
tel. 06/869898

Unione Italiana Associazioni Produttori Zootecnici
UIAPZOO
Roma - via Alessandria 199
tel. 06/860240

Unione Nazionale Avicoltura
UNA
Roma - via Pasubio 4
tel. 06/316397

Unione Nazionale Associazioni Produttori Ovicaprini
UNAPROC
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale fra le Associazioni dei Produttori di Latte Bovino
UNALAT
Roma - via XXIV Maggio 43
tel. 06/4744975

Unione Nazionale Incremento Razze Equine
UNIRE
Roma - via Catania 9/A
tel. 06/42131

Unione Nazionale Costruttori Macchinari Agricoli
UNACOMA
Roma - via Spallanzani 22/A
tel. 06/8449441

INDEX

Foreword

Territory, population and economy: general characteristics

page 8

1

Italian agriculture in 1988

page 14

Value added in agriculture
Employment
Productivity
Food consumption
The agro-industrial system
Final agricultural product and agricultural income
Production
Prices and costs
Intermediate inputs
Foreign trade
Agricultural credit
Agricultural investment
Mechanisation

2
The structure of Italian agriculture
page 34
The number of farms
Access to UAA
Type of enterprise
Farm size
Utilisation of farm land
Livestock
Specialisation in production and economic size of farm
Labour
Forests

3
The legislative and administrative framework
page 52
The roles of Central and Regional administrative bodies
Planning and the principal legislation governing intervention
Principal organisations operating in the agricultural sector

4
Appendix
page 60
Glossary
Usuful addresses

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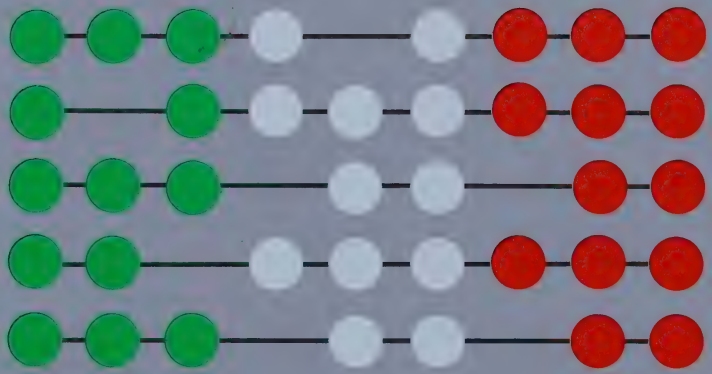

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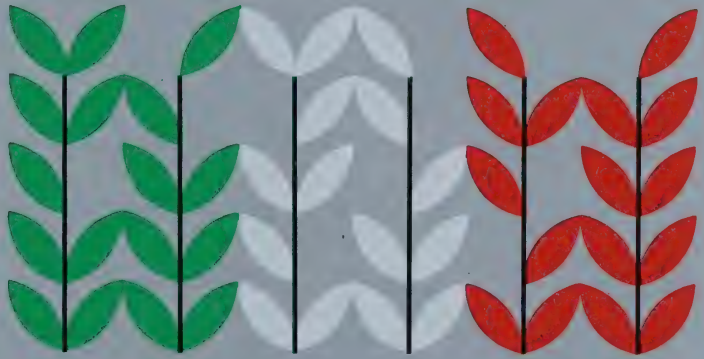
MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ITALIAN AGRICULTURE IN FIGURES



1990

NORTH

1 Valle d'Aosta
2 Piemonte
3 Lombardia
4 Trentino Alto Adige
5 Veneto
6 Friuli Venezia Giulia
7 Liguria
8 Emilia Romagna

CENTRE

1 Toscana
2 Umbria
3 Marche
4 Lazio

SOUTH

1 Abruzzo
2 Molise
3 Campania
4 Puglia
5 Basilicata
6 Calabria
7 Sicilia
8 Sardegna

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are from ISTAT, the Italian Central Statistical Office.
EUROSTAT data have been used for
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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ITALIAN AGRICULTURE IN FIGURES

Prepared by the
Istituto Nazionale di Economia Agraria

1990

Calogero Mannino
Minister of Agriculture and Forests

In view of the favourable response to the first edition, the Ministry of Agriculture and Forests is presenting this 1990 edition of "Italian Agriculture in Figures" in an updated and extended version.

This official booklet has proved its usefulness in many circumstances since it offers a synthetic yet complete outline of the Italian agricultural sector, presenting the most significant statistical data and trends.

In order to guarantee uniformity and continuity, the structure of the booklet has remained unchanged and is made up of three sections:

- analysis of economic trends
- structural analysis
- legal and administrative aspects.

The most important innovation is to be found in the section on analysis of economic trends where agriculture is presented as a component of the agro-industrial system and its relationships with factor markets, the food industry and food retailing are examined in this context.

In addition, the environmental question has been introduced with the inclusion of information on the availability of land resources and the relationship between agriculture and the environment.

The Appendix, containing the addresses of the main bodies operating in the agricultural sector, has also been extended and new items included.

The statistical data presented here are the most recent supplied by national and European sources. They refer to 1989 for economic analysis and for the legal and administrative framework, and to 1987 for structural analysis.

The Ministry for Agriculture and Forests is grateful to the National Institute of Agricultural Economics (INEA) for the invaluable collaboration in preparing this publication.

TERRITORY POPULATION AND ECONOMY

GENERAL CHARACTERISTICS

An important feature of the Italian national territory is the predominance of the hilly and mountainous areas. Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre.
Population has continued to increase over recent decades.
The rate of population growth, has, however, fallen from 0.5% to about 0.1%. There are considerable differences in climatic conditions over the peninsula, from the continental climate of the North to the milder sub-continental conditions of the coastal areas and the typically Mediterranean climate of the South and the Islands.

TERRITORY AND POPULATION IN 1989

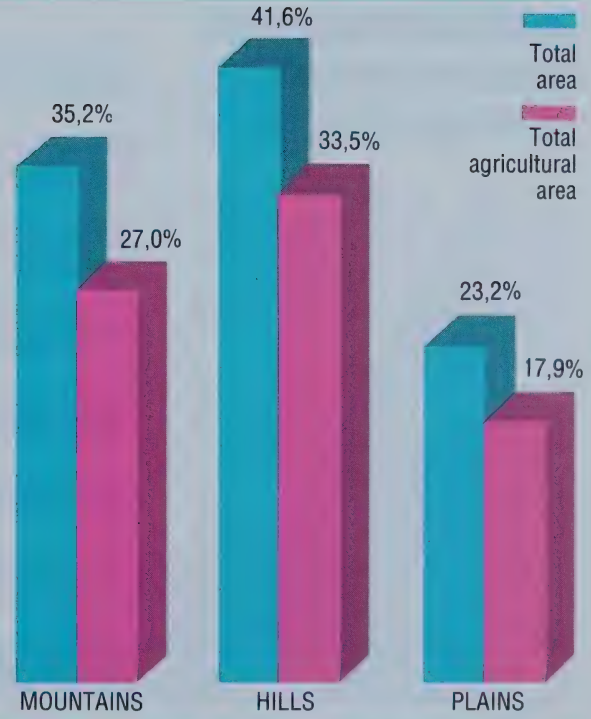
Districts	Total area km^2	Agricultural area (1) %	Population (2) (000)	Density no/km^2	Work force (000)
North	119,889	46.5	25,508	213	11,193
Centre	58,344	50.8	10,982	188	4,659
South	123,046	67.4	21,086	171	8,017
Italy	301,279	55.9	57,576	191	23,870

(1) Including arable land, land under tree crops permanent pasture, nurseries. Percentage of total land area.
(2) Resident at year end.

TERRITORY BY ALTIMETRIC ZONE (000 ha)

Zone	North	Centre	South	Italy
Mountains	5,532	1,576	3,502	10,610
Hills	2,272	3,722	6,548	12,542
Plains	4,185	536	2,254	6,975
Total	11,989	5,834	12,304	30,127

TOTAL AREA BY ALTIMETRIC ZONE



THE AGRICULTURAL AREA AND THE AVAILABILITY OF LAND

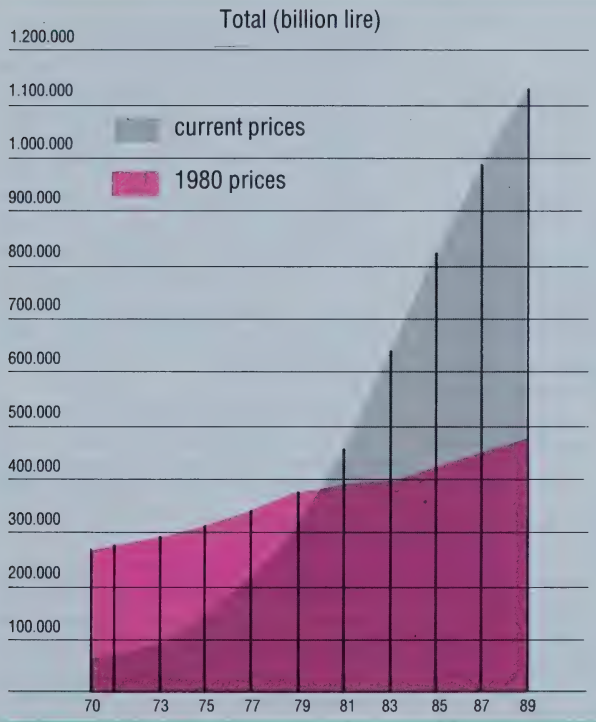
The process of urbanisation is progressively absorbing land in Italy. Unproductive areas, mainly residential and for infrastructure, are increasing and are estimated at about 2.8 million hectares or 9% of total national territory.

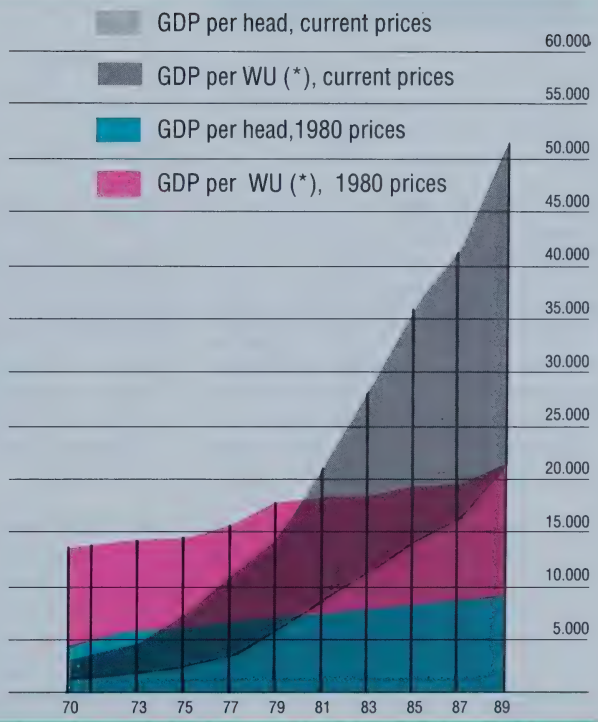
The agricultural area, on the other hand, is continuously decreasing: from 1970 to the present time the utilised agricultural area (UAA) diminished by more than 1,600,000 hectares (-9.5%).

This is a phenomenon which affects all developed and newly industrialised countries. Land is thus becoming an ever-more precious resource, especially in countries which, like Italy, have a high population density and where national territory is subject to considerable variations in altitude.

RATIOS OF POPULATION TO AGRICULTURAL AREA

GROSS DOMESTIC PRODUCT, 1970 - 1989





(*) WU = work unit

AGRICULTURE AND ENVIRONMENT

If agriculture is practised with due respect for eco-systems, it serves to protect and rehabilitate both land and environment.

On the other hand, it can also be counted amongst productive activities which, especially in more intensive forms, cause pollution. Much more frequently, however, the agricultural sector itself suffers from the effects of water and air contamination. Inter-relation ships between agriculture and the environment are changing. At present, three main types of problem can be identified:

- maintenance and conservation of legally protected areas such as natural habitats, safeguard zones for water, landscapes of particular interest. There are at present five national parks in Italy:
  - Gran Paradiso
  - Stelvio
  - Abruzzo
  - Circeo
  - Calabria.

  The programme put forward by the Ministry for the Environment envisages the establishment of national parks in the Dolomiti Bellunesi, Pollino, Monti Sibillini, Golfo di Orosei (as already indicated in the Financial Law of 1988), and one in Aspromonte, as well as some inter-regional parks such as those of the Po Delta, Falterona Campigna and the Foreste Cosentinesi.

- the management of land resources through methods of production suited to environmental requirements as well as the preservation of nature and landscapes outside the official zones of protection.

- an improved, i.e. more natural, quality of produce.

Different measures, both at Community and at national level, are intended to further these goals. Within the framework of the Community's structural policy, Regulation 3808/89 provides both for a specific premium for those farmers who undertake to carry out farming practises compatible with the needs of environmental conservation and for a regime of payments aimed at extensification and withdrawal of land from production.

At the level of national policy, the question of the environment is an emerging problem which must be affronted jointly with the Ministry for the Environment.

The basic principles of an agricultural policy compatible with environmental resources are delineated in the recently up-dated (13th October 1989) version of the National Agricultural Plan.

The main lines of action are as follows:

- the orientation of agricultural research towards environmental issues
- encouragement of a correct utilisation of productive techniques
- health safety in food production
- the eradication of plant disease
- organic agriculture
- encouragement of specific measures in environmentally sensitive areas defined by Regional authorities and priority to reafforestation schemes
- support to land reclamation authorities.

PROTECTED AREAS IN ITALY (km^2)

Type	1984	1988	% change 1984-88
Nature reserves, State admin.	1,444	1,647	+14.1
National parks	2,685	4,085	+52.1
Humid zones	490	492	+0.4
Regional and natural parks	5,019	6,727	+34.0
Total	9,638	12,951	+34.4
% Total land area	3.18	4.30	

Source: Ministero dell'Ambiente.

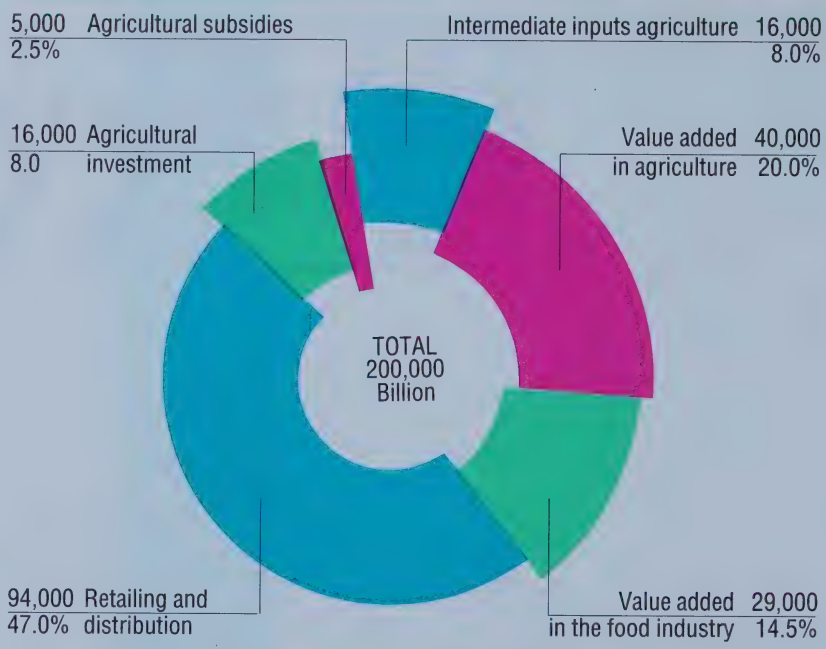
1

THE ITALIAN AGRO-INDUSTRIAL SYSTEM IN 1990

THE AGRO-INDUSTRIAL SYSTEM

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it, both upstream (the production of inputs: fertilisers, pesticides, feed compounds, energy, etc.) and downstream (food and catering industries). The whole system is connected with a dense trading and distribution network. Estimates based on national accounts set the value of the agro-industrial complex in 1989 at 200,000 billion lire, of which 40,000 attributable to value added in agriculture, 16,000 to intermediate inputs, 16,000 to agricultural investment, 29,000 to value added in the food industry and 94,000 to the trading and distributive sector. Services supplied both by public and private sectors are not included in the estimates, even though they make an important contribution to the system.

THE MAIN AGGREGATES OF THE AGRO-INDUSTRIAL SYSTEM



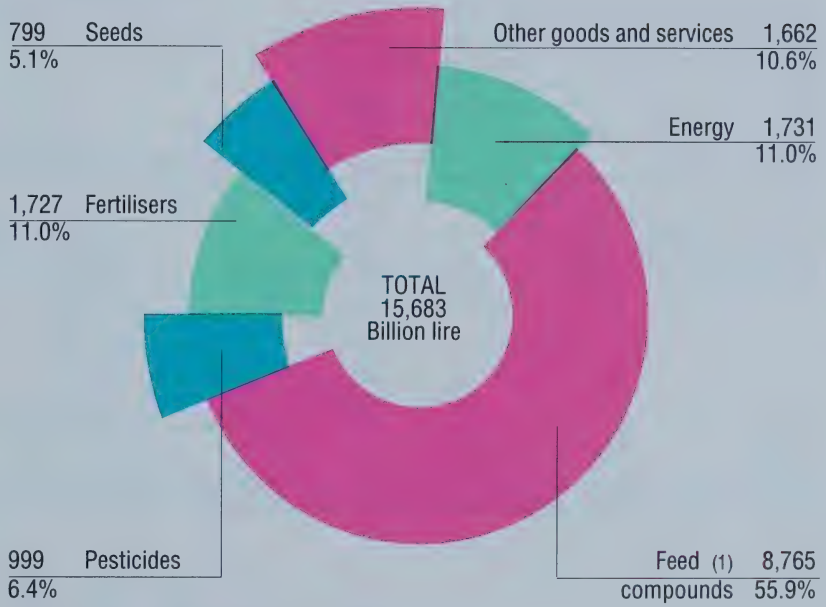
Estimates on the basics of value of food production
Source: calculations based on ISTAT data.

FACTORS OF PRODUCTION

INTERMEDIATE INPUTS

Expenditure for the livestock sector represents the highest proportion of the total for intermediate inputs. As compared with 1970 total expenditure for current goods and services has grown in real terms by 70%, nevertheless the rate of growth has slowed down during the 1980s.

INTERMEDIATE INPUTS BY MAIN TYPE



(1) Including other expenditure for livestock.

INVESTMENT

In 1989 agricultural investment fell considerably in real terms, partially offsetting the recovery that had been experienced in the previous year.
During the 1980s, the trend in agricultural investment has been subject to wide variations which have decidedly damped its dynamism. Its share in total investment is falling, and, as a ratio to value added in the sector, it is now lower than at the beginning of the decade.

TRENDS IN AGRICULTURAL INVESTMENT 1980-1989 (*)

Years	Value at current price	Value at constant (1980 prices)	% of total gross fixed investment (1980 prices)	Agricultural investment as % VA agriculture
1980	7,460	7,460	7.9	31.6
1981	8,650	7,130	7.8	30.0
1982	9,230	6,580	7.6	28.6
1983	10,580	6,735	7.9	26.9
1984	11,680	6,760	7.6	28.1
1985	12,175	6,485	7.2	26.7
1986	13,040	6,560	7.1	26.6
1987	13,590	6,470	6.9	25.3
1988	16,150	7,270	7.0	29.5
1989	15,830	6,740	6.2	26.6

(*) Including forestry and fishing.
Source: INEA calculations on ISTAT data.

AGRICULTURAL CREDIT

Agricultural credit represents only a part of total credit requested by farmers who, to to an ever-increasing degree, are turning to ordinary channels of credit. In 1988 the amount of agrarian credit erogated increased by 8.3% over 1987 even though demand for subsidised credit slowed down, decreasing from 62.3% of total credit in 1987 to 56.8% in 1988. The increase in credit for improvements was particularly noticeable (+31,7%) mainly because of non subsidised loans covered in foreign currency; the increase in short-term loans for working capital and other was limited; credit for equipment was stationary.

AGRICULTURAL CREDIT: EROGATIONS BY DISTRICT (*)

Type of credit	NORTH		CENTRE		SOUTH	
	Billion lire	% of total credit subsidised	Billion lire	% of total credit subsidised	Billion lire	% of total credit subsidised
Working capital	5,074	41.7	1,842	56.1	4,048	82.5
Other short-term operations (1)	1,110	57.3	517	33.8	1,260	77.1
Equipment (2)	557	33.7	289	23.9	332	63.3
Farm improvements	1,133	37.7	345	52.2	643	62.1
Total	7,874	42.8	2,993	48.7	6,283	78.3

(*) Data fron Bank of Italy are not available for 1989.
(1) Advances with agricultural credit as collateral, loans to agricultural bodies and associations.
(2) Purchase of livestock and machines.

MECHANISATION

Between 1970 and 1988 the national stock of agricultural machines more than doubled. More widespread mechanisation has enabled the farmer to carry out operations with greater efficiency and punctuality and more productively. In the same period of time, it must be added, the amount of labour employed, in terms of work units, fell by 36%. There was a marked increase in the use of all main categories of machines, and particularly of small motorised machines. In the South the increase in mechanisation showed an increase even more pronounced than in the rest of the country for nearly all the main types of machinery except for combined harvesters.

THE STOCK OF AGRICULTURAL MACHINES AND CHANGES SINCE 1970 (*)

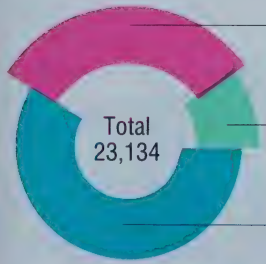
Type	North		Centre		South		Italy	
	N.	% change	N.	% change	N.	% change	N.	% change
Tractors (1)	772	86,0	270	173,6	325	205,9	1.367	120,5
Combined harvesters	24	67.2	10	171.6	11	119.9	45	98.2
Mowers and other motors (2)	538	33.7	205	131.5	490	272.1	1,233	98.0
Small agric. machines	74	265.6	29	266.0	77	552.5	180	350.4
Other machines and others motors	184	33.1	87	58.8	227	75.2	498	54.4
Total	1,592	60.9	601	136.9	1,130	194.0	3,232	104.2

(*) Numbers in thousands at 31-12-1988.
(1) Including accessories.
(2) Motorcultivators and motorhoes.
Source: UNACOMA.

EMPLOYMENT

The structure of employment has changed considerably over time: in 1970 agriculture and industry accounted for about 60% of total employment; in 1989 the situation was completely reversed and the service sector absorbed 60% of employment. Between 1970 and 1989 the number of agricultural workers, in terms of work units, decreased by 1,484,000 (-39.2%) passing from 19% to about 9.9% of total employment. In the same period the ratio between agricultural employment and total population steadily changed: in 1970 it was one to fourteen, in 1980, one to nineteen and in 1989 one to twenty five. In industry the corresponding ratio remained almost stationary, whereas in the service sector change was in the opposite direction. In 1989 32.7% of agricultural workers were wage employees.

WU PER SECTOR (000)



Industry	6,863	29.7%
Agriculture	2,297	9.9%
Services	13,974	60.4%

WORK UNITS TO TOTAL POPULATION BY SECTOR

AGRICULTURE

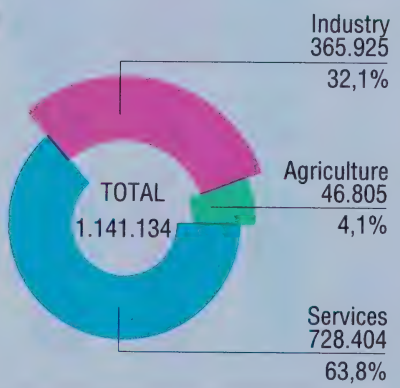
VALUE ADDED

In 1989 the direct contribution of the primary sector to total value added at factor cost was 4.1%. At constant prices, value added at factor cost in agriculture fell from 8.1% in 1970 to 6.2% in 1980 and to 5.4% in 1989. In the same period the contribution of the service sector increased, whilst that of industry remained stationary.

In Italy, the agricultural sector is relatively more important, both in terms of value added and in terms of employment, than in other industrialised countries

Trends in the latter variables which have emerged in recent years, however, bring Italy closer to the positions of the other countries of North and Central Europe.

VA BY SECTOR (billion lire)



THE SHARE OF AGRICULTURE IN THE NATIONAL ECONOMY

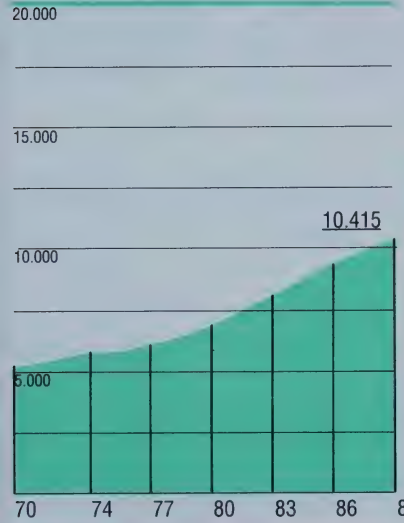
INTERNATIONAL COMPARISONS

Countries	Value added %	No.s employed %
Italy	(*) 4.5	(*) 9.9
France	3.5	6.8
Spain	5.2	14.4
Greece	15.6	27.0
Fed. Rep. of Germany	1.5	4.3
Netherlands	4.1	4.8
United Kingdom	1.7	2.2
EEC 12 (1)	3.2	7.4
USA	2.1	2.9
Japan	3.0	7.9

(*) EUROSTAT data which differs from ISTAT data previously cited on account of different methods of calculation.
(1) Belgium, Denmark, Fed. Rep. of Germany, Greece, Spain, France, Ireland, Luxembourg, Netherlands, Portugal, United Kingdom.

PRODUCTIVITY

In 1989 value added per work unit in agriculture at constant market prices amounted to half the national average and to about 40% of that in industry.



VA/WU BY SECTOR AT 1980 PRICES (000 lire)

PRODUCTION

The harvest reflected atypical weather conditions throughout the EEC area.

In Italy the value of final agricultural output (VFO) increased by about 2% in real terms, an increase which did not offset the fall of 2.4% experienced in 1988.

A substantial expansion in field and tree crops was accompanied by stagnation in the livestock sector. The VFO of field crops increased by 3.7% in real terms with wide variations for different crops: cereal output fell for the third successive year (-4.1%), largely because of the poor harvest of hard wheat in the South.

There were increases for horticultural products (+4.7%) and industrial crops (+12.5%) which recovered after the unsatisfactory performance of the previous year. Growth in flower production continued (+9.1%). The increase in VFO for tree crops of 3.2% was lower than had been foreseen.

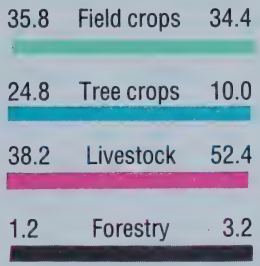
The effect of bad weather was strongly felt and in several instances it affected the quality of the product. There were significant increases in the production of olives (+15%) and citrus (+6.7%); a modest increase in fruit (+1.5%); and a fall in the wine sector (-2%).

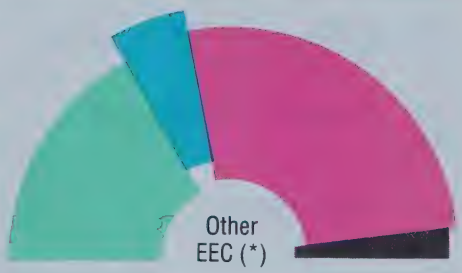
VALUE OF FINAL AGRICULTURAL OUTPUT BY SECTOR

	North		Centre		South		Italy	
	Bn. lire	%	Bn. lire	%	Bn. lire	%	Bn. lire	%
Field crops (1)	8,521	30.6	3,789	46.7	7,582	38.6	19,892	35.8
Tree crops	4,405	15.8	1,596	19.7	7,780	39.7	13,781	24.8
Livestock	14,529	52.1	2,597	32.0	4,134	21.1	21,260	38.2
Forestry	421	1.5	133	1.6	113	0.6	667	1.2
Total	27,876	100.0	8,115	100.0	19,609	100.0	55,600	100.0

(1) Including forage.

FINAL AGRICULTURAL OUTPUT: COMPARISONS BETWEEN ITALY AND THE REST OF THE EEC (% of values)





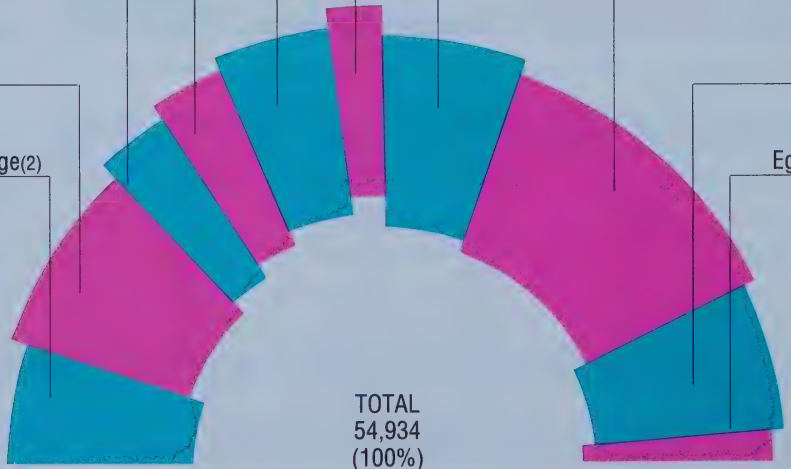
CHANGES IN THE VALUE OF FINAL AGRICULTURAL OUTPUT SINCE 1980 (% value at 1980 prices)

Sector	North	Centre	South	Italy	Other EEC (*)
Field crops (1)	+34.8	+33.0	+5.6	+ 21.4	+ 28.8
Tree crops	-9.2	-3.9	-4.0	- 5.6	
Livestock	+9.0	12.0	-4.7	+ 3.2	+ 4.2
Forestry	-5.3	+15.1	-10.0	- 2.9	+ 1.3
Total	+12.7	+12.5	-0.6	+ 7.1	+ 14.0

(1) Including forage. (*) France, F. R. Germany, Belgium, Luxembourg, Netherlands, Denmark, United Kingdom, Ireland, Spain, Portugal. For the table changes refer to the period 1981 - 1988.

THE VALUE OF FINAL AGRICULTURAL OUTPUT BY MAIN PRODUCTIVE SECTOR (billion lire)

4,790	Grapes	Olives	2,275
8.7%			4.1%
3,040	Flower and nursery production	Fruit and citrus	6,213
5.5%			11.3%
3,127	Industrial crops (1)	Meat	13,409
5.7%			24.4%
8,663	Vegetables	Milk	6,392
15.8%			11.6%
5,566	Cereals and forage(2)	Eggs and other	1,459
10.1%			2.8%



(1) Sugar beet, tobacco, textile, fibres and other industrial products.

(2) Forage crops amount to L.147 billion and dried pulses to L. 130 billion

PRODUCTION OF MAIN CROPS AND CHANGES AS COMPARED WITH 1988

Crop	Area		Yield	Harvest		Final product	
	000 ha	% ch.	q/ha	000 q	% ch.	Billion lire	% ch.
Soft wheat	1,145	4.8	38.9	43,514	8.0	1,357	10.1
Hard wheat	1,806	1.3	17.3	30,562	-22.1	1,241	14.4
Maize	805	-4.4	80.0	63,818	1.5	1,495	-8.1
Rice	206	3.8	60.5	12,390	13.3	721	9.7
Sugar beet	293	6.2	560.1	162,077	19.7	1,043	7.0
Tobacco	106	12.8	18.6	2,130	2.0	765	2.0
Soya	453	4.9	37.6	16,897	20.0	1,107	14.1
Sunflowers	118	nd	23.8	2,900	nd	177	nd
Potatoes (early and common)	123	-3.9	201.5	24,436		-811	21.9
Tomatoes	134	15.5	455.3	56,609	23.9	1,286	10.1
Grapes (desert and wine)	1,072	-0.2	89.1	95,509	0.1		
Wine (000 hl)				59,800	-2.0	4,187	14.7
Olives (table and for oil)	1,160	-0.4	-23.9	27,654	19.2		
Oil (000 ql)				4,922	14.3	2,082	21.7
Apples	84	-4.5	270.5	21,066	-9.6	1,161	6.5
Pears	49	-	183.4	7,760	-22.1	562	-12.5
Peaches and nectarines	110	-	177.6	16,111	11.7	1,159	13.4
Oranges	106	-0.9	209.9	22,050	1.6	1,003	-11.1
Lemons	39	-	219.6	7,203	1.7	504	-3.8
Mandarines and clementines	33	-2.9	158.6	5,327	29.8	314	+3.,9
Actinidia	19	11.8	188.6	2,463	33.7	547	+29.1

In the livestock sector, overall production of meat was stationary and there was a slight drop in milk production (-0.8%).

The production of cows' milk was affected by the decrease in the number of breeding cows. As regards different types of meat, there were increases for pork (+2%), poultry (+2.5%), sheep and goat meat (+8%) and reductions in beef (-2.7%) and rabbit meat (-1.0%)

MAIN LIVESTOCK PRODUCTS AND CHANGES AS COMPARED WITH 1988

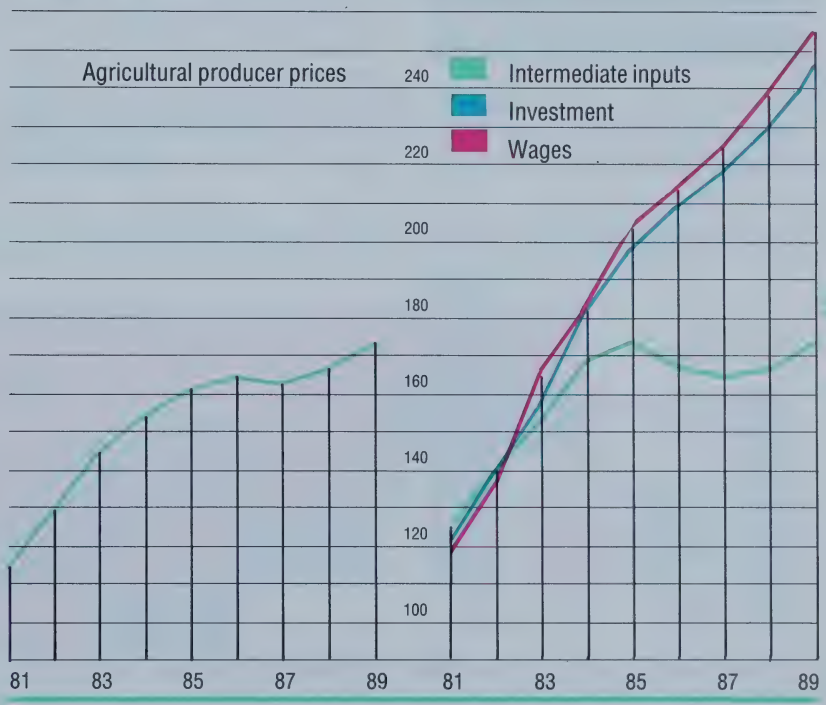
Product	Numbers		Production (6)		Final product	
	000 head	% ch.	000 q	% ch.	bill. l.	% ch.
Cattle (1)	8,853	0.1	15,182	- 27	5,443	9.7
Pigs	9,261	- 1.1	14,695	2.0	3,286	12.3
Sheep and goats	12,918	0.6	930	6.8	403	11.0
Poultry (2)	167,800	2.2	13,400	2.5	2,979	3.4
Rabbits (3)	-	-	3,460	- 1.0	1,217	4.6
Eggs (4)	-	-	11,640	- 0.1	1,410	5.8
Cows milk (5)	-	-	96,040	- 1.4	5,724	5.1
Sheep and goats milk (5)	-	-	5,900	2.0	668	6.7

(1) Including buffaloes.
(2) Laying hens, hens, turkeys, guinea fowl. *Source:* UNA.
(3) Including game.
(4) Production in millions.
(5) Production in 000 hl.; buffalo milk included with cows' milk.
(6) Live weight for meat.

PRICES AND COSTS

Prices for agricultural products generally rose less rapidly than prices of the main inputs; trends were particularly unfavourable as compared with those for prices of investment goods and wages of salaried labour.

PRICES AND COSTS - INDEX NUMBERS (base 1980 = 100)



THE VALUE OF FINAL AGRICULTURAL OUTPUT

Disaggregating the value of final output including subsidies, we find that a quarter of the total is accounted for by the value of intermediate inputs (seed, fertiliser, feed concentrates, energy etc.) and a fifth, by wages for employed labour. Subsidies paid by the State and by the EEC account for 9%. About 37% of gross VFO went to self-employed labour (farm entrepreneurs and family workers) and to capital. Disparity between agricultural and non-agricultural incomes is very marked, both for wages of employed labour, which are 30% lower than the national average and for self-employed workers; the sum accruing to the latter group is much reduced when allowance is made for depreciation and other running expenditure.

THE STRUCTURE OF AGRICULTURAL INCOME (billion lire)

58,259 Final product (1)
16,352 Intermediate inputs
526 Indirect taxes on production
12,600 Depreciation
12,760 Wages
Production subsidies 5,424
Gross value added at factor cost 41,907
Gross value added at market prices 46,805
Net value added at factor cost 34,205
Net operating profits 21,445

(1) Including forestry and fishing. *Source:* calculation on ISTAT and EUROSTAT data.

THE FOOD INDUSTRY

The food industry is a fast expanding branch of the manufacturing sector. During the 1980s it consolidated its growth: value added at factor cost in real terms rose between 1980 and 1989 by an average annual rate of 2.5%.

In terms of current prices, value added in the food industry rose in the same period from an equivalent of 39% of value added in agriculture to an equivalent of 54%.

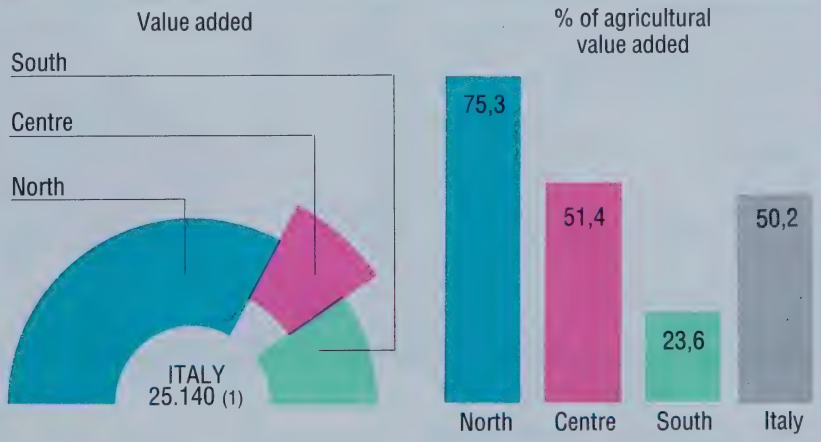
The market for industrial food products is in continuous expansion and attracts considerable investment, both Italian and foreign.

We are, moreover, witnessing a growing concentration of firms within the industry and an imposing presence of large multinational groups. At the same time strong regional differences remain, with processing activities concentrated in the Centre-North. There are also structural problems due to the high number of firms of inadequate size and to those using inappropriate technology.

In the EEC area, the agro-food industry is an important sector both for employment and for value added. *In order to give a more detailed account of it, reference has been made to statistics available only for years preceding 1989.*

VALUE ADDED IN THE FOOD INDUSTRY

BY DISTRICT (*)



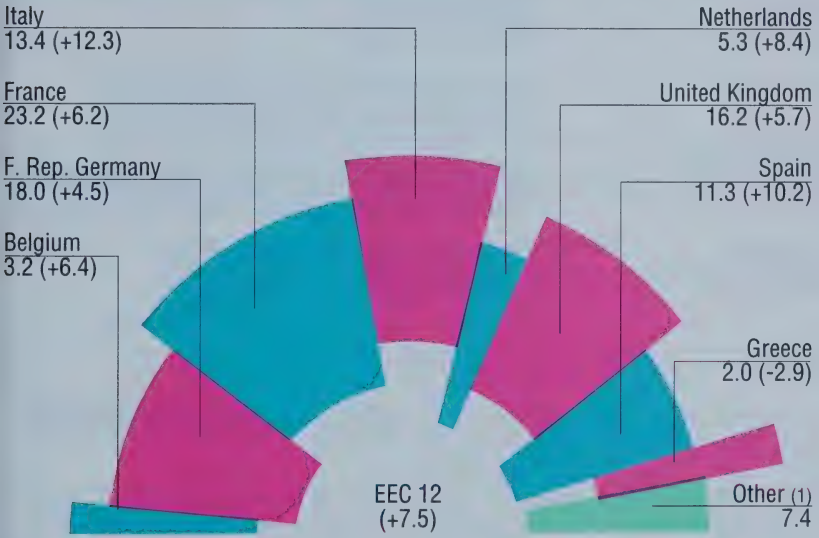
(*) Value added at factor cost, including beverages and tobacco.
(1) The total differs from that of page14 which is at market prices. .

ECONOMIC AGGREGATES OF INDUSTRIAL FOOD ENTERPRISES WITH AT LEAST 20 EMPLOYEES (*)

Sectors	Turn over billion lire		Gross product billion lire	Investment billion lire	Numbers employed
	total	% exported			
Milling and pasta (1)	6,603	10.7	1,045	239	15,984
Biscuits and bread	3,838	7.5	1,117	207	21,381
Fruits and vegetables	3,326	31.0	627	197	18,800
Oils and fats	4,210	5.6	184	123	6,510
Butchery and meat processing	9,373	4.2	1,589	287	29,143
Dairy prods.	7,586	3.6	1,230	237	21,311
Sugar refining	2,624	2.2	471	232	6,659
Confectionery	3,222	11.4	1,068	167	18,090
Various (2)	3,631	3.4	914	141	13,231
Frozen foods	1,425	6.3	362	64	6,020
Wine and alcoholic beverages	4,388	18.4	1,012	158	12,354
Beer and malt	1,435	0.4	402	93	5,113
Mineral water and soft drinks	2,646	1.2	840	161	9,266
Animal feedstuffs	4,847	2.7	637	94	7,632
TOTAL	59,154	7.7	11,498	2,400	191,494

(*) Excluding fish products and tobacco industry.
(1) Including starch products.
(2) Food extracts, dietary products, coffee, tea, etc.
Source: calculated on ISTAT data, 1987.

THE FOOD INDUSTRY - DISTRIBUTION OF PRODUCTION IN THE EEC AND RATES OF GROWTH (*)



(*) Percentage share in 1985 and change 1985/1988.
(1) Denmark, Ireland, Luxembourg, Portugal.
Source: EUROSTAT, Industrial production.

TRENDS IN PRODUCTION IN ITALY

Sectors	1985/89
Milling and pasta	↑
Biscuits and bread	↓
Fruit and vegetables	↑
Vegetable and animal fats	↓
Butchery and meat processing	↓
Dairy products	—
Sugar refining	↓
Confectionery	↓
Frozen foods	↑
Various	↑
Wine and liqueurs	↓
Mineral water and soft drinks	↑↑
Beer and malt	↓
Animal feedstuffs	↓

RETAIL DISTRIBUTION

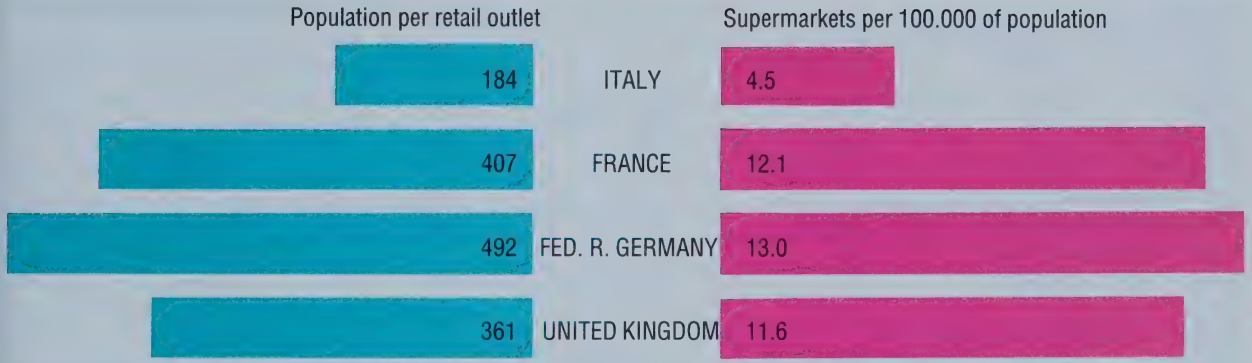
In 1989 there were 38,000 wholesalers operating in food distribution, 31% of the national total of wholesalers; food retailing firms numbered 312,000 and represented 36% of total retail outlets; there were 2,800 supermarkets with a total sales area of 2.3 million square metres and employing 59,000 workers. An interesting process of rationalisation has been under way for several years in which the number of retailers is falling whilst that of wholesalers is increasing and large-scale retailing is becoming more widespread. In Italy only a little more than one fifth of total expenditure on food passes through large-scale outlets, as against about 50% in France, Germany and Great Britain.

FOOD MARKETING CHANNELS BY DISTRICT

	North		Centre		South		Italy		Italy	Trend
	No.	%	No.	%	No.	%	No.	%	change % on 1981	
Wholesale	18,646	49.4	6,437	17.1	12,642	33.5	37,725	100.0	+9,9	↑
Retail										
Ordinary	133,093	42.7	61,686	19.8	117,187	37.5	311,966	100.0	- 11,8	↓
Mobile	16,887	43.2	8,223	21.0	14,017	35.8	39,127	100.0	- 34,5	↓↓
Supermarkets	1,629	57.8	564	20.0	625	22.2	2,818	100.0	+ 85,3	↑↑

Source: calculated on data from Ministero Industria, Commercio e Artigianato.

INDICATORS OF FOOD RETAILING IN THE ECC



Source: calculated on data from Ministero Industria, Commercio e Artigianato.

COOPERATION

Cooperation in the agricultural sector involves about 24,000 societies and about 25-30% of the value of final output.
In the ten years 1979-1988 the number of cooperative enterprises increased by 29%, a higher rate of increase than in other sectors of the economy.
At the moment, they constitute a little more than 15% of all cooperative societies enrolled on the national register.
Recent trends show a higher growth rate in southern areas.

Despite the expansion, however, there are several causes for concern within the movement, related to management ability, productive efficiency and financial backing. Forms of collaboration with the processing industry (limited companies, joint ventures, etc.) have recently become extremely important.

AGRICULTURAL COOPERATIVES BY MAIN CATEGORY AND DISTRICT

CATEGORY	North	Centre	South	Italy
Ploughing etc.	713	755	2,628	4,096
Forestry (1)	269	150	166	585
Dairy	2,404	129	394	2,927
Wine cellars (2)	389	149	659	1,197
Oil presses	40	162	540	742
Jams, marmalades etc.	19	15	21	55
Fruit and vegetables, harvesting, processing, marketing	584	225	1,760	2,569
Milling and processing cereals	36	23	25	84
Livestock raising and meat prep.	933	483	1,020	2,436
Silkworm farming	19	2	8	29
Cultivation and first processing tobacco	16	43	121	180
Grain storage	15	1	3	19
Sale of ag. produce	156	110	184	450
Machinery hire	518	71	139	728
Marketing farm inputs (3)	353	109	387	849
Various (4)	508	232	718	1,458
Raising and marketing small animals	88	61	151	300
Farm improvements(5)	595	682	3,484	4,761
Other	34	45	305	384
Total	7,689	3,447	12,713	23,849

(1) Including flower and nursery production. (2) Including distilleries. (3) Including Consorzi Agrari.
(4) Social assistance, services for members, disinfestation.
(5) Including storage, processing and sale of produce delivered by members.
(6) Cultivation and first-stage processing of cotton and joint services for land reform areas.
Source: calculated on data from Ministero del Lavoro e Previdenza Sociale, 31 December 1988.

FOOD CONSUMPTION

In 1989 household expenditure on food amounted to more than 148,000 billion lire, about one fifth of total expenditure.
The percentage of food to total expenditure has steadily fallen over time.
If, in addition to food consumption at home, that outside the home (in restaurants or canteens) is considered, total expenditure rises considerably and amounts to between 170,000 and 180,000 billion lire, including the expenditure of foreign tourists in Italy.

THE PATTERN OF FOOD CONSUMPTION

Products	% food expenditure	Annual average rate of ch. 1970/89	
		quantity %	price %
Bread and cereals	11,8	0,77	12,41
Meat	28,5	1,91	11,82
Fish	6,3	2,39	13,96
Dairy produce and eggs	14,2	1,88	12,22
Fats and oils	3,7	0,97	10,22
Horticultural produce (1)	21,7	0,97	12,45
Other (2)	6,5	0,84	10,70
Alcoholic beverages	5,5	- 0,26	11,21
Non-alcoholic beverages	1,8	4,56	10,66
Total	100,0	1,36	11,62

(1) Including patatoes.
(2) Coffee, tea, cocoa, sweets, etc.

The most important item of household food expenditure is meat, which, at 42,150 billion lire, accounted in 1989 for more than 28% of total expenditure. This is followed by horticultural products with an expenditure of more than 32,000 billion lire (22%); dairy products and eggs with 21,000 billion lire(14%); derivatives of cereals, 17,500 billion lire (11.7%); fish 9,300 billion lire (6%); wine and other alcoholic beverages with 8,100 billion lire (5.5%). Between 1970 and 1989 the relative weight of expenditure on household food consumption shows the following trends:

- meat
- dairy produce
- horticultural produce
- wine
- fish

HOUSEHOLD CONSUMPTION OF MAIN FOOD PRODUCTS (kg. per head)

Products	North	Centre	South	Italy
Bread	49.7	6.57	80.7	63.2
Pasta	30.6	36.8	43.9	36.7
Milk	86.2	78.8	71.1	78.8
Cheese	13.1	10.5	11.8	12.1
Eggs	6.8	8.5	9.1	7.8
Beef	20.6	26.0	22.5	22.3
Pork (1)	18.5	22.3	18.8	19.3
Poultry	12.8	18.8	12.8	13.9
Fish	7.5	11.5	13.7	10.5
Fresh vegetables	156.8	195.6	197.1	178.9

(1) Excluding salami etc.
Source: Processed from ISTAT data.

The strong Mediterranean component in the Italian diet is clearly indicated in the levels of per capita consumption. As compared with the EEC average, in Italy consumption per head is 40% higher for cereal-based products and 60% for wine; in contrast, consumption of milk and pork is about 20-25% less. Consumption of other products,beef and cheese, is more or less in line with European standards.

FOOD CONSUMPTION IN THE EEC (kg. per head)

Products	Italy	France	Spain	Greece	Fed. Rep. Germany	United Kingdom	EEC12
Cereals (1)	117	79	71	98	74	79	84
Rice	5	4	6	5	2	3	4
Potatoes	42	74	106	78	72	111	81
Vegetables (2)	173	119	148	195	77	86	119
Fruit inc. citrus	114	77	80	138	129	52	93
Milk (3)	75	99	n.d.	54	85	128	n.d
Cheese	16	22	n.d	22	15	7	n.d.
Butter	2	9	n.d.	2	8	5	n.d
Meat	81	98	80	81	98	73	86
Beef	27	32	11	26	24	23	23
Pork	29	37	39	24	62	25	39
Fats and oils	29	22	31	27	21	30	26
Sugar (4)	27	35	24	28	35	45	34
Wine (5)	66	76	48	28	26	10	42

N.B.: data refer to the crop year 1987/1988.
(1) In flour equivalent.
(2) Including processed.
(3) Including other fresh products.
(4) White sugar equivalent.
(5) Litres per head.

FOREIGN TRADE

The agro-food balance of trade is permanently in deficit; nevertheless the extent to which export values cover those of imports has increased continuously since 1970 due to the relatively more rapid growth of exports.

THE AGRO-FOOD TRADE BALANCE AT 1989 PRICES

Years	Imports bill. lire	Exports bill. lire	Balance bill. lire	Level of cover (1)	Level of exposure (2)
1970	18278	6139	-12139	33,6	44,4
1980	26380	9544	-16836	36,2	59,3
1989	31577	12767	-18810	40,4	76,8

N.B.: Including all food products derived from agricultural or forestry activity, game and fish, fresh or industrially processed, as well as all products from the same sources not destined for human consumption.
(1) Percentage ratio of exports to imports.
(2) Percentage ratio between the sum of exports and imports and value of final agricultural product.

FOREIGN TRADE BY MAIN CATEGORY OF AGRO-FOOD PRODUCT (billion lire)

Product group	Imports	Exports	Balance
CROPS	7,737	3,717	-4,020
Cereals	2,593	341	-2,252
Wheat	1,955	268	-1,687
Maize	295	51	-244
Vegetables	511	784	273
Fruit	968	1,964	996
Citrus	31	119	88
Coffee, tropical beverages	1,076	14	-1,062
Oilseeds	460	7	-453
Uncured tobacco	315	153	-162
Cotton	791	13	-778
LIVESTOCK	4,733	63	-4,670
Live animals	2,741	24	-2,717
Milk	1,121	10	-1,111
FOREST PRODS.	1,192	86	-1,106
FISH AND GAME	2,175	143	-2,032
Fresh and frozen fish	1,944	138	-1,806
INDUSTRIAL FOOD PRODUCTS	11,409	6,448	-4,961
Flour and pasta	26	976	950
Rice	40	398	358
Sugar	150	98	52
Confectionery	399	421	22
Meat	5,043	804	-4,239
Processed fish	704	135	569
Processed tomatoes	78	902	824
Other processed vegetables	501	683	182
Cheese and butter	1,864	583	-1,281
Olive oil	710	387	-323
Other oils and fats	342	156	-186
WINE AND VERMOUTH	247	1,714	1,467
OTHER BEVERAGES	594	290	-304
OTHER PROCESSED AGRICULTURAL PROD.	3,490	306	-3,184
TOTAL	31,577	12,767	-18,810

FOREIGN TRADE IN AGRO-FOOD PRODUCTS WITH THE EEC AND THIRD COUNTRIE S (1) (billion lire)

Area and Countries	Imports	Exports	Balance
EEC	20,423	8,235	-12,188
France	6,481	1,989	-4,492
Fed. R. Germany	4,582	3,255	-1,327
Belgium - Luxembourg	1,212	464	-748
Netherlands	3,860	522	-3,338
Denmark	1,206	169	-1,037
Spain	841	281	-560
Greece	1,356	251	-1,105
United Kingdom	571	1,194	623
URSS and COMECON	806	163	-643
OTHER EUROPEAN COUNTRIES	1,786	1,442	-344
AMERICA	3,033	1,165	-1,868
USA	875	899	24
Canada	186	147	-39
Brazil	813	26	- 787
AFRICA	1,189	1,147	-42
Morocco	126	4	-122
Algeria	3	444	441
Tunisia	197	63	-134
MIDDLE EAST	125	337	212
CHINA	211	5	-206
JAPAN	29	134	105
OTHERS (2)	643	140	-503

(1) Excluding forest products, textiles fibres, wool and other non-food agricultural products. (2) Australia, New Zealand and other countries in Asia and Oceania.
Source: calculations on ISMEA data.

2

THE STRUCTURE OF ITALIAN AGRICULTURE

THE NUMBER OF FARMS

With reference to the EEC definition, which is more restrictive than the national one, and on the basis of the survey carried out by ISTAT in 1987, the number of farms with agricultural and forest land is 2,788,712.

Of these, 31.1% are situated in the northern part of the country on a farm area equivalent to 38.3% of the national total; in the central area 16.4% of farms occupy 20.6% of the national farm area; the remaining 52.6% of farms and 41% of area are to be found in the south and the islands.

In the last 5 years there has been a stronger reduction in the number of farms, with an annual average decrease of 0.3% as compared with the almost irrelevant decrease which took place between 1970 and 1982.

In contrast, the reduction in the total

NO. OF FARMS TOTAL AGRICULTURAL AREA AND UAA BY DIS

District and survey	No. farms	Total area	
		Hectares	Average per farm
ITALY			
1970	2,832.6	23,650.3	8.3
1982	2,823.6	22,127.8	7.8
1987	2,778.7	21,625.3	7.8
NORTH			
1970	956.9	8,802.4	9.2
1982	882.0	8,278.5	9.4
1987	860.8	8,032.5	9.3
CENTRE			
1970	470.1	4,712.9	10.0
1982	462.2	4,449.3	9.6
1987	454.3	4,384.8	9.6
SOUTH			
1970	1,405.6	10,135.0	7.2
1982	1,479.4	9,400.0	6.4
1987	1,463.6	9,208.0	6.3

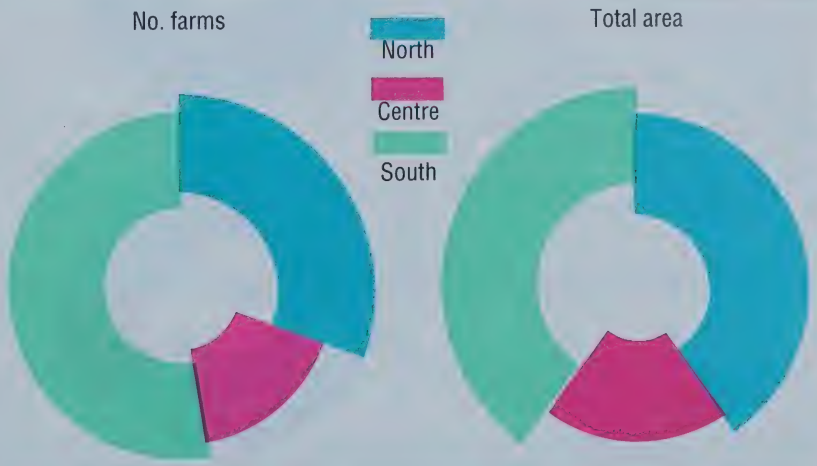
Data refer only to farms with agricultural and forest land; 5,375 farms with livestock only are excluded.

CT (numbers in thousands)

Utilised agricultural area		
ctares	% total area	Average per farm
,178.8	72.6	6.1
,711.7	71.0	5.6
,544.6	71.9	5.6
,878.1	66.8	6.1
,429.4	65.6	6.2
,371.4	66.9	6.2
,030.5	64.3	6.4
,829.5	63.6	6.1
,794.5	63.7	6.1
,270.2	81.6	5.9
,452.8	79.3	5.0
,378.7	80.1	5.0

area (500,000 hectares or 0.5% per year) was lower than that between the two Census dates mentioned (-1.4 million hectares). All three districts were affected more or less in the same way by the decreases mentioned, both as regards the number of farms and as regards area. As a result, the average size of farm has remained virtually unchanged

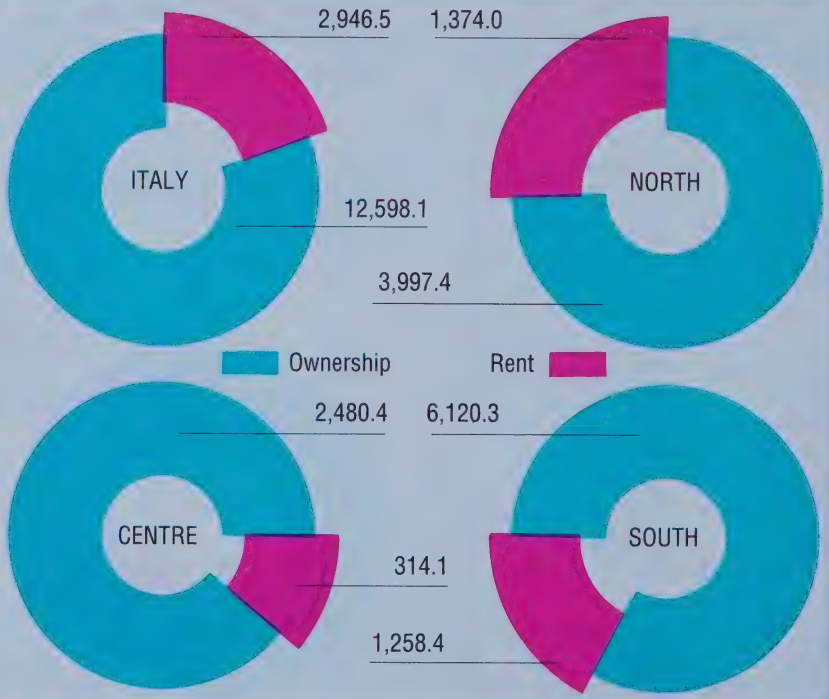
NO. OF FARMS AND TOTAL AGRICULTURAL AREA BY DISTRICT



ACCESS TO AGRICULTURAL LAND IN USE

More than 80% of UAA is owned. There are, however, differences between the three main districts of the country: in the Centre this form of access accounts for 88.8% of UAA but only for 74.4% in the North. Over the years, the amount of land rented has remained more or less stable whereas ownership has acquired greater importance with the increase in owner-operators counterbalanced by a fall in share-tenancies and other forms of access.

UAA BY TYPE OF ACCESS (000 hectares)



TYPES OF ENTERPRISE

Almost all farms in Italy (95.8%) are owner-operated; of these, 82.8% are farmed with family labour (including the farmer himself).
This form of enterprise is particularly common in the North (89.7%) whilst in the South it amounts to 76.6%.

Both in the North and in the South share-tenancy is irrelevant, whereas together with other forms of enterprise it still maintains a certain degree of importance in the Centre of the country.

NUMBER OF FARMS BY TYPE OF ENTERPRISE AND TOTAL AGRICULTURAL AREA

District	Total	Owner operated holdings			Farms	Share-tenancy
	(000)	With exclusiv. family labour %	With mainly family labour %	With mainly non family labour %	with hired labour %	and other %
FARMS						
North	863.3	89.7	7.5	2.8	2.4	0.6
Centre	454.6	89.5	7.6	2.9	3.7	2.5
South	1,466.1	76.6	16.9	6.5	3.7	0.5
Italy	2,784.0	82.8	12.5	4.7	3.3	0.9
TOTAL AGRICULTURAL AREA						
North	8,032.5	76.1	16.0	7.9	26.8	0.7
Centre	4,384.8	76.7	13.8	9.5	37.9	2.7
South	9,208.1	64.7	22.8	12.5	19.0	1.0
Italy	21,625.4	70.9	18.8	10.3	25.8	1.2

FARM SIZE

The small size of Italian farms was confirmed once again in 1987. In fact, farms with less than 5 hectares of UAA account for 77.2% of the total whereas 29.7% do not even exceed 1 hectare and occupy only 2.6% of UAA.

In contrast, slightly less than one fifth of UAA is absorbed by large farms (100 hectares and more).

Whilst the number of large farms has remained more or less stable over time, there has been an increase in very small ones (up to 1 hectare) with a very slight reversal of trend in the last two years in favour of intermediate sized farms.

The situation in Italy is markedly different from that in other EEC countries where, overall, the smallest farms represent only 15.4% of the total and the largest, 2.3%.

NO. OF FARMS BY SIZE OF UAA IN ITALY AND IN THE EEC

FARMS AND UTILISED AGRICULTURAL AREA BY SIZE OF UAA (no.s and ha.s in thousand)

Size of UAA in ha.	1970		1987			
			Italy		Other EEC 12	
	Farms	UAA	Farms	UAA	Farms	UAA
NUMBERS						
Less than 1 (1)	602.4	297.6	810.1	403.7	904.9	434.1
1<5	1,542.9	3,632.0	1,340.1	3,044.6	2,071.2	5,033.5
5<10	397.4	2,747.1	333.0	2,277.3	829.4	5,839.1
10<20	187.5	2,548.7	171.3	2,339.3	765.0	10,897.5
20<50	82.2	2,440.1	91.6	2,714.9	854.5	26,790.7
50<100	22.7	1,561.2	24.8	1,685.0	300.9	20,415.8
100 and over	14.8	3,952.1	13.2	3,079.8	134.4	30,444.0
Total	2,849.9	17,178.8	2,784.1	15,544.6	5,860.3	34,854.7
PER CENT						
Less than 1 (1)	21.1	1.7	29.1	2.6	15.4	0.4
1<5	54.1	21.1	48.1	19.6	35.3	5.3
5<10	14.0	16.0	12.0	14.6	14.2	6.1
10<20	6.6	14.8	6.1	15.1	13.1	11.4
20<50	2.9	14.2	3.3	17.5	14.6	28.2
50<100	0.8	9.1	0.9	10.8	5.1	21.5
100 and over	0.5	23.0	0.5	19.8	2.3	32.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

(1) Including farms without UAA.

UTILISATION OF FARM LAND

Italy is a Mediterranean country and therefore tree crops (vines, olives, fruit) are widely cultivated, being found on 69.3% of farms and occupying about 18.7% of UAA (mainly in vineyards and olive groves).

Field crops are likewise widespread, occupying more than half the total UAA and present on 67% of farms; most important are cereals and rotation forage.

On slightly more than one fifth of farms there is cultivated woodland, which altogether occupies 4.3 million hectares (about 19.7% of total area).

NO. OF FARMS AND AREA SOWN TO CERTAIN MAIN CROPS

Crops	North	
	No. farms	Area sown (ha)
ANNUAL CROPS	659.6	3,136.3
Cereals	436.3	1,640.7
Soft wheat	167.4	457.6
Hard wheat	22.2	89.3
Maize	306.3	731.8
Potatoes	58.5	16.5
Sugar beet	48.7	175.4
Industrial crops	83.0	287.5
Outdoor horticultural crops(1)	96.3	68.4
Rotation forage	222.0	900.4
TREE CROPS	457.5	600.1
Vineyards	372.4	315.9
for DOC quality wines	98.2	150.7
Olive groves	33.0	19.9
Fruit and nuts (2)	125.8	223.9
Citrus	1.9	0.2
PERMANENT PASTURE	320.3	1.635.0
TOTAL UAA	860.0	5.371.4
CULTIVATED WOODLAND (3)	296.7	1475.0
OTHER (4)	773.4	916.1
TOTAL AGRICULTURAL AREA	860.8	8.032.5

(1) Including garden plots. (2) Including chestnut groves. (3) Including poplar plantations.

usand farms and thousand hectares)

Centre		South		Italy	
No. farms	Area sown (ha)	No. farms	Area sown (ha)	No. farms	Area sown (ha)
342.1	1,746.0	858.8	3,531.2	1,860.5	8,413.5
225.8	939.7	567.6	2,194.9	1,229.7	4,775.3
140.7	367.5	152.4	174.7	460.5	999.8
37.8	267.9	388.9	1,591.2	448.9	1,948.4
88.3	115.4	85.9	57.4	480.5	904.6
31.5	8.6	99.9	41.1	189.9	66.2
13.8	48.5	17.7	47.6	80.2	271.5
17.8	87.4	44.9	62.0	145.7	436.9
109.9	49.0	304.9	198.1	511.1	315.5
155.5	541.3	216.5	659.3	594.0	2,101.0
335.1	472.5	1,134.2	1,835.2	1,926.8	2,907.8
245.2	191.1	589.3	570.4	1,206.9	1,077.4
49.7	82.9	44.7	50.5	192.6	284.1
201.6	204.3	718.0	804.4	952.6	1,028.6
56.0	48.1	243.5	247.8	425.3	519.8
2.9	1.1	132.3	162.4	137.1	163.7
100.4	576.0	227.1	2.013.3	647.8	4,223.3
454.3	2,794.5	1,463.2	7.378.7	2,777.5	15,544.6
132.5	1,259.2	172.8	1.248.3	602.0	4,252.5
343.9	331.1	810.7	581.0	1,928.0	1,828.2
454.3	4,384.8	1,463.6	9.208.0	2,778.7	21,625.3

(4) Agricultural area not utilised and other

IRRIGATION

Irrigation is practised on 26.1% of farms on a total area of 2.9 million hectares. It is most commonly found in the North (34.2% of farms) and less so in the Centre (16.0% of farms, 10.8% of the district's UAA).

FARMS WITH IRRIGATION BY DISTRICT

District	Farms		Area irrigated	
	number	% of all farms with SAU	hectares	% of UAA
North	293,783	34.2	1,787,568	33.3
Centre	72,443	16.0	301,702	10.8
South	359,357	24.6	836,744	11.3
Italy	725,583	26.1	2,926,014	18.8

LIVESTOCK

Livestock is raised on only 38.3% of farms, after a significant decline in the number engaged in all types of animal-raising over the years.
Herd numbers, however, have increased considerably, except for horses, donkeys and mules.

For example, although there has been a 51% decline in the numbers of farms raising pigs since 1970, pig numbers increased by the same percentage; numbers of sheep, now standing at 8.1 million head rose by 35.9%.
The increase in bovines was much more limited (+2.4%), with a fall of 53.3% in the number of farms.
The average size of livestock farm has therefore almost doubled, except for pigs where the average number passed from 7 to 21 head.
More than half the total bovine herd is concentrated in just 7.8% of farms (those with 50 and more head), whilst 59% of farms account for only 12.1% of the national herd.
As regards pig farms, 67.6% have only 1-2 head and own barely 4.6% of the domestic total; in contrast, 2.3% of farms (with 100 head and more) own 80%.

FARMS WITH LIVESTOCK AND LIVESTOCK NUMBERS (thousands)

Type	1970			1987				
	Italy			Italy			Other EEC 12	
	Farms	Head		Farms	Head		Head	
		No.	Avj. per farm		No.	Avj. per farm	No.	Avj. per farm
Cattle	939.5	8,701.4	9	439.0	8,906.7	20	73,894.7	33
Dairy cattle	604.4	2,861.2	5	283.4	2,762.6	10	22,610.5	17
Pigs	857.6	5,834.6	7	420.3	8,794.8	21	90,125.8	57
Sows	125.2	549.9	4	59.6	688.0	11	11,453.9	20
Sheep	211.0	5,986.6	28	176.2	8,138.2	46	86,364.8	105
Goats	124.0	857.1	7	96.3	1,132.7	12	9,341.5	15
Equines	443.3	533.1	1	68.4	165.8	2	1,458.5	2
Laying hens	1,304.6	43,012.8	33	669.7	48,957.7	73	314,710.1	125
Poultry	852.5	59,617.7	70	442.3	74,712.3	169	372,574.9	353

CATTLE AND PIG RAISING ENTERPRISES BY NUMBER OF HEAD (thousands)

Number of head	North		Centre		South		Italy		Other EEC 12
	Farms	Head	Farms	Head	Farms	Head	Farms	Head	Farms
CATTLE									
1 - 2	31.0	52.0	19.0	30.1	32.5	52.3	82.5	134.4	310.2
3 - 9	80.3	433.1	31.0	157.2	64.9	354.7	176.2	945.0	546.8
10 - 19	40.5	551.0	11.1	149.8	27.4	374.0	79.0	1,074.8	361.0
20 - 49	40.6	1,234.4	7.5	226.9	18.7	549.7	66.8	2,011.0	501.4
50 and over	26.8	3,926.4	2.6	354.2	5.1	460.9	34.5	4,741.5	491.8
Total	219.2	6,196.9	71.2	918.2	148.6	1,791.8	439.0	8,908.7	2,211.2
PIGS (*)									
1 - 2	66.2	93.6	73.0	107.2	144.8	205.8	284.0	406.6	770.1
3 - 9	14.9	61.1	22.7	95.2	52.7	233.2	90.3	389.5	324.6
10 - 49	7.2	150.0	9.2	173.1	15.3	297.3	31.7	620.4	227.6
50 and over	9.3	6,217.5	3.3	929.6	1.7	240.2	14.3	7,378.3	253.7
Total	87.6	6,522.2	106.2	1,298.0	214.5	976.5	420.3	8,794.8	1,576.0

(*) Estimates based on EEC data.

LABOUR

Altogether an input of 585 million days' labour was absorbed on farms in Italy, the greater part of it (86.7%) being family labour. The employment of non-family labour continues to fall, although at a slower rate, especially in the North, where permanently employed labour is important, and in the South, where share croppers and casual labourers are frequent.

TOTAL FARM

LABOUR TIME (thousand days)

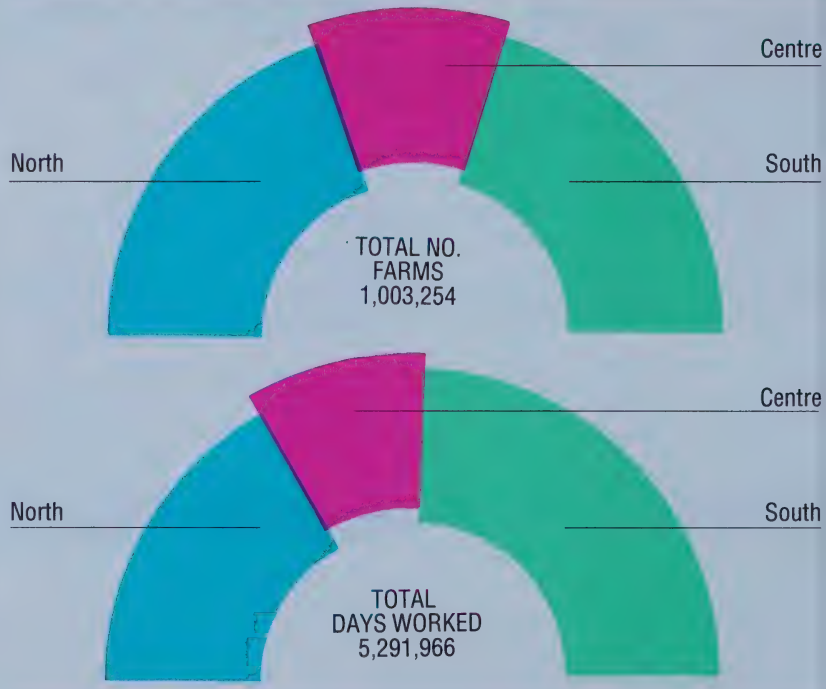
Type of worker	North	Centre	South	Italy
Family	200,941	87,648	218,408	506,997
Operator	112,049	49,028	132,295	293,372
Wife	36,868	19,116	43,851	99,835
Other family	52,024	19,504	42,262	113,790
Non-family	23,171	13,587	41,183	77,941
regular	11,329	5,260	3,218	19,807
casual	11,842	8,327	37,965	58,134
TOTAL	224,112	101,235	259,591	584,938

In recent years there has been a significant increase in family labour and an increased tendency to employ agricultural contractors which now supply an estimated 5.3 million days on 36% of farms.

The age of farm entrepreneurs continues to increase: more than 59.7% of them are over 55 years old and half of these are more than 65, whilst the proportion of entrepreneurs younger than 35 continues to decrease.

Finally, the number of farmers who work exclusively on their own farms is increasing and there is a fall in the number of those who practise non-agricultural activities as their main employment (20.6%).

NO. OF FARMS AND NO. DAYS CONTRACT LABOUR



DISTRIBUTION OF FARMS BY AGE OF ENTREPRENEUR (*) (thousands)

DISTRIBUTION OF FARM ENTREPRENEURS BY FARM AND OFF-FARM EMPLOYMENT

District	Total	Exclusively on-farm	Mainly on-farm			Mainly off-farm		
			Total	With employment on other farms	With employment in other sectors	Total	On other farms	In other sectors
NUMBERS								
North	857,010	662,511	27,657	7,933	15,892	166,842	12,499	100,489
Centre	451,314	324,241	16,751	5,179	9,054	110,322	9,684	69,184
South	1,463,543	1,120,177	50,344	20,659	25,314	293,022	78,725	181,995
Italy	2,771,867	2,106,929	94,752	33,771	50,260	570,186	100,908	351,668
% DISTRIBUTION BETWEEN TYPES OF EMPLOYMENT								
North	30.9	31.4	29.2	23.5	31.6	29.3	12.4	28.6
Centre	16.3	15.4	17.7	15.3	18.0	19.3	9.6	19.7
South	52.8	53.2	53.1	61.2	50.4	51.4	78.0	51.7
Italy	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
% DISTRIBUTION BETWEEN DISTRICT								
North	100.0	77.3	3.2	0.9	1.9	19.5	1.5	11.7
Centre	100.0	71.9	3.7	1.2	2.0	24.4	2.1	15.3
South	100.0	76.0	3.4	1.4	1.7	20.0	5.4	12.4
Italy	100.0	76.0	3.4	1.2	1.8	20.6	3.6	12.7

NUMBER OF AGRICULTURAL WORK UNITS BY CLASS OF EUROPEAN SIZE UNIT (Thousands)

Class of size unit (ESU) (*)	North		Centre		South		Italy		Other EEC 12	
	WU	%	WU	%	WU	%	WU	%	WU	%
Up to 1,99	118.9	14.7	84.1	22.9	227.5	23.7	430.5	20.2	1,128.2	16.2
2 - 3,99	88.6	11.0	69.5	18.9	189.0	19.7	347.1	16.3	893.3	12.9
4 - 5,99	75.6	9.4	41.2	11.2	113.8	11.9	230.6	10.8	609.0	8.8
6 - 7,99	57.7	7.2	24.8	6.7	76.4	8.0	158.9	7.4	442.1	6.4
8 - 11,99	82.6	10.2	35.0	9.5	95.7	10.0	213.3	10.0	626.8	9.0
12 - 15,99	54.7	6.8	22.8	6.2	54.9	5.7	132.4	6.2	437.1	6.3
16 - 39,99	173.3	21.5	49.2	13.4	120.7	12.6	343.2	16.1	1,438.4	20.7
40 - 99,99	94.3	11.7	23.2	6.3	46.6	4.9	164.1	7.7	863.6	12.4
100 and over	60.7	7.5	18.0	4.9	33.5	3.5	112.2	5.3	505.4	7.3
Total	806.4	100.0	367.8	100.0	958.1	100.0	2.132.3	100.0	6,943.9	100.0

(*) 1 ESU = Lire 1,671,600

SPECIALISATION IN PRODUCTION AND THE ECONOMIC SIZE OF FARM

It proved possible to classify about 2,774,000 (99.6% of all farms) according to economic criteria and, of these, 78.6% are specialised in production, with specialisation in permanent crops being particularly important (39.6%).

Results show that 67.4% of farms are completely or prevalently specialised in crop production and to these must be added a further 13.2% of farms practising poly-culture.

As compared with 1975, there has been a significant increase in specialisation in crops, whereas the degree of specialisation in livestock is stationary or slightly declining.

In contrast, in other EEC countries there is a considerable amount of livestock farming, especially in the northern European countries. More than 65% of Italian farms do not reach an economic size of 4 European Size Units (about 6.7 million lire per year) and this group absorbs 13.3% of national standard gross margin, i.e. 20,582,000 ESU.

At the other extreme, 61.1% of national gross margin is enjoyed by 9.7% of farms, and one fifth of income is, moreover, produced by 0.8% of farm.

DISTRIBUTION OF FARMS BY

TF

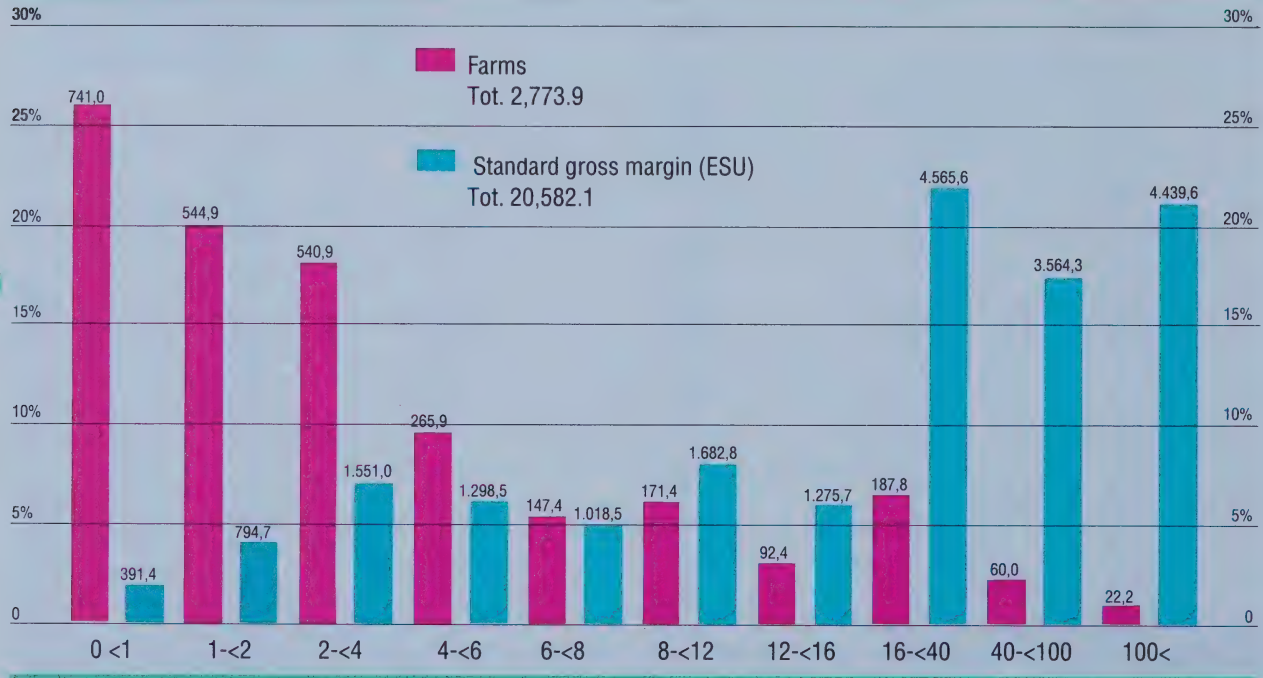
SPECIALISED FARMS:
Annual crops
Cereals
Other
Horticulture and floriculture
Permanent crops
Grapes
Olives
Other mixed permanent crops
Herbivorous animals
Dairy cattle
Beef cattle
Dual purpose cattle
Other
Granivorous animals
MIXED FARMS
Mixed crops
Mixed livestock
Crops and livestock
Annual crops and herbivorous animals
TOTAL

TYPE OF FARMING (TF) (thousands)

1975		1987			
		Italy		Other EEC12	
Farms	%	Farms	%	Farms	%
1,783.7	67.0	2,180.0	78.6	4,117.0	70.7
646.0	24.3	733.2	26.4	1,090.6	18.7
248.6	9.4	272.5	9.8	453.6	7.8
397.4	14.9	460.7	16.6	637.0	10.9
29.8	1.1	39.8	1.4	188.5	3.2
815.8	30.6	1,096.5	39.6	1,245.0	21.4
280.4	10.5	328.3	11.9	274.3	4.7
118.4	4.4	288.4	10.4	337.1	5.8
417.0	15.7	479.8	17.3	633.6	10.9
269.6	10.1	291.4	10.5	1,485.5	25.5
106.0	4.0	96.7	3.5	612.6	10.5
21.8	0.8	28.1	1.0	294.2	5.0
46.4	1.7	31.8	1.1	114.7	2.0
95.4	3.6	134.8	4.9	464.0	8.0
22.5	0.9	19.1	0.7	107.4	1.9
878.2	33.0	593.9	21.4	1,703.4	29.3
454.9	17.1	366.1	13.2	654.1	11.3
152.0	5.7	70.5	2.5	401.2	6.9
271.3	10.2	157.3	5.7	648.1	11.1
179.9	6.8	94.3	3.4	360.6	6.2
2,661.9	100 .0	2,773.9	100.0	5,820.4	100.0

HOLDINGS AND STANDARD GROSS MARGIN

BY CLASS OF EUROPEAN SIZE UNIT (ESU) (*) (thousands)



FORESTS

Information about the size and characteristics of forests in Italy is taken from the National Inventory of Forests carried out by the Ministry for Agriculture and Forests in 1985.

The total area under forests, 8.7 million hectares, occupies 28.8% of total national land area. 70.9% of the total forest area is made up of coppice and high forest,3.3% of plantations for intensive non-timber production (chestnuts, cork) and as much as 25.8% of particular forms of vegetation.

The latter, consisting mainly of shrubland, cliff and coastal vegetation, are particularly important from an environmental point of view and, in future, from the point of view of forest development.

Deciduous trees are predominant, occupying 80% of forest area.
About 60% of Italian forests are in a healthy state.

The main sources of damage are weather (8 %), parasites (6%), grazing and game (7%), fires (4%) and other causes, including acid rain (5%).

Differences between the data shown in the table and those from other statistical sources, including ISTAT, are mainly due to differences in classification and survey method.

FOREST AREA BY ALTITUDE AND BY TYPE OF OWNERSHIP (000 ha)

Altitude (metres above sea level)	North	Centre	South	Italy
Up to 500	849	966	1,248	3,063
501 - 1000	1,183	813	1,248	3,244
1.001 - 1.500	867	205	500	1,572
Over 1500	672	26	98	796
Total	3,571	2,010	3,094	8,675
Public ownership	1,189	508	1,240	2,945
Private ownership	2,372	1,504	1,850	5,730

FOREST AREA BY SPECIES OF TREE (000 ha.)

	North	Centre	South	Italy
High forests	1,178	231	770	2,179
Red spruce	263	0	1	264
White pine	128	26	75	229
Beech	30	39	155	224
Coniferous	292	13	21	326
Mixed, mainly coniferous	111	34	72	217
Deciduous	103	26	156	285
Coppice	1,148	1,368	857	3,673
Chestnut	196	108	71	375
Beech	155	83	93	331
Turkey oak	26	123	60	209
Other oak	105	261	173	539
Mixed	913	666	342	1,921
Non-timber production	136	28	125	289
Special types of vegetation	662	295	1,204	2,161
Other	147	87	138	372
Total	3,571	2,010	3,094	8,675

3

THE LEGISLATIVE & ADMINISTRATIVE FRAMEWORK

THE ROLES OF CENTRAL AND REGIONAL ADMINISTRATIVE BODIES

The framework of authority as regards agriculture is regulated by the following laws:

- **Law no. 281 of 16th May 1970** and the subsequent **Presidential decree no.11 of 15th January 1972.**
- **Law no. 382 of 22nd July 1975** and subsequent **Presidential decree no.616 of 24th July 1977.**

Both transfer to the Regional authorities the greater part of responsibility for agriculture.
Thus all the measures most directly related to production have become subject to Regional intervention, including:

- Crop production and livestock rearing
- Collection, processing and distribution of produce
- Extension and professional training

As stated in article 4 of the Presidential decree 616/77 "the Central Government shall excercise the functions of guiding and coordinating... and, also for those areas of responsibility tranferred or delegated, functions concerning international relations, those with European Economic Community, national defence and public security".

In particular, in agriculture, the main responsabilities of the Central authorities concern:

- research, experimentation and information of national interest
- measures of national interest for regulating agricultural markets
- guarantee of security in supplies
- the organisation of international trade
- the fund for national solidarity in case of catastrophe or adverse climatic conditions

In the process of national planning, for the purpose of carrying out policies for production, agricultural markets and food, the Central authorities decide:

- the orientation of production and objectives
- areas of the country to be given preference
- maximum levels for incentives
- measures for implementing market policies
- general guidelines for implementing EEC regulations and directives
- financial coordination between regional and national intervention measures as regards markets

PLANNING AND LEGISLATION GOVERNING INTERVENTION

THE NATIONAL PLAN FOR AGRICULTURE

Planning in the Italian agricultural sector for the five year period 1986-1990 is governed by the National Plan for Agriculture drawn up by the Ministry for Agriculture and Forests in accordance with its responsibilities for guiding and coordinating the sector. The National Plan for Agriculture has the following objectives:

CENTRAL OBJECTIVE

- Support to and development of agricultural incomes. This objective is to be pursued by improving the efficiency of the farm enterprise in a market-orientated agricultural sector designed to make the maximum contribution to the stable economic growth of the nation.

SPECIFIC OBJECTIVES

- Protection of employment in agriculture, especially of young people, and particularly in economically backward areas, in order to open up opportunities for mixed activities
- Promotion of balanced economic growth, evenly spread over national territory.
- Protection of land, environment and water resources
- Maintenance of a degree of self-sufficiency in food compatible with resources and national agricultural productivity.

The plan is made up of a set of sub-programmes. These are:

AN OUTLINE PLAN

The first edition was approved by the CAA (Interministerial Committee for Food and Agricultural Policy) on 1st August 1985. There have subsequently been two updated versions: the was first approved by CIPE (Interministerial Committee for Economic Planning) on 23rd April 1987, the second, at present in force, on 13th October 1989.

SECTORAL PLANS

- Olives and olive oil
- Grapes and wine
- Sheep and goats
- Bee-keeping (approved by CIPE on June 1990).

ACTION PLANS

- Against plants pests and diseases
- Against low ferility rates.

The National Plan for Agriculture reconciles objectives and measures in national policy with those of Community policy and both in analytical terms and with regard to the future, emphasises the importance of a synergy of initiatives. In fact, the greater part og intervention measures in Italy are governed by **EEC Regulations** the most important of which are illustrated in the following table.

THE MAIN REGULATIONS OF THE EUROPEAN ECONOMIC COMMUNITY

Regulation		Purpose
REG. 3808/89	which modifies	Acceleration of the adjustment process in agricultural production
	REG. 797/85	Improving the efficency of agrarian structures
	REG. 1094/88	Retirement of land from agricultural production
	REG. 1096/88	Encouraging retirement from agricultural activities
	REG. 4115/88	Extensivisation of production
REG. 270/79	*modified by Reg. 1760/87*	Development of agricultural extension and information
REG. 496/80	*modified by Reg. 1442/88*	Concession of premiums in the 1988-89/1995-96 crop years for the destruction of vineyards
REG. 355/77	*modified by Reg. 1932/84*	Improvement of conditions for marketing and processing agricultural produce
REG. 140186		The improvement of agriculture in certain less-favoured areas in the north of Italy
REG. 2088/85		Integrated Mediterranean Programmes
REG. 2052/88		The emission of structural funds, their effectiveness and the coordination of these measures with those financed by the European Investment Bank and other existing sources of finance

AGRICULTURAL STABILISERS

In order to bring agricultural markets into equilibrium and to reduce budget problems, from 1988 onwards the European Community has introduced mechanisms for limiting production known as agricultural stabilisers. They are in operation for all the products subject to the common organisation of the market and reduce the level of support if production thresholds or maximum guaranteed quantities (MGQ) are surpassed.

MGQ FOR THE MAIN PRODUCTS

1989/90 CROP YEAR (000 tons)

Cereals	160,000
Sugar	
Quota A	10,539
Quota B	2,289
Sunflower	2,000
Soya	1,300
Tobacco	385
Olive oil	1,350
Oranges	1,249
Peaches	376
Apples	478
Processed tomatoes	
Concentrate	2,987
Peeled	1,307
Other	405
Milk	97,392

LAW 752/86

The legal instrument governing finance for the National Plan for Agriculture is **law no. 752 of 8th November 1986**: "The law for expenditure over several years for measures planned in the agricultural sector".

As foreseen in the Outline Plan, this law provides for financing for measures undertaken by the Central Government and by Regions, authorising overall expenditure for the five-year period 1986-1990 of 16,500 billion lire and stipulating allocations year by year.

In response to proposals by the Ministry for Agriculture and Forests, each year the CIPE approves the deliberations through which the National Plan for Agriculture is implemented and provides for the measures foreseen by the Plan using the financial means made available though the law 752/86.

FINANCE EROGATED UNDER LAW 752/86

CIPE Deliberation	Allocation (billion Lire)
17th December 1986	2,765,000
23rd April 1987	2,993,000
14th June 1988	3,250,000
2nd May 1989	3,292,000
15th May 1990	3,029,000

THE NATIONAL PLAN FOR FORESTS

This plan was envisaged in article 2 of the law no. 752/86 and was approved by the CIPE (Interministerial Committee for Economic Planning) in December 1987. The objectives include the establishment of consortia for the management of forest resources, measures to help firms as regards technological development and the maintenance and development of forests, a policy for the improvement of infrastructure, the establishment of urban parks.

LAW NO.183/87

This guarantees finance for Community Regulations through a rotating fund at the Ministry for the Treasury.

LAW NO.88/88

This law concerns inter-professional agreements and contracts for the

cultivation and sale of agricultural products for processing or for marketing unprocessed.
The law attempts to regulate supply so as to bring it into line with demand in foreign and domestic markets, to improve the quality of production, to establish criteria and general conditions for production and sale of products and for supplying services, to fix product prices in advance or criteria for the determination of prices.
The Ministry for Agriculture may intervene in establishing agreements, in particular as regards the product concerned, the methods and timing of delivery,the minimum price, the methods and timing of payment, quantities and quality requirements, the period for stipulating contracts.

LAW NO 87/90

Law no 87 was approved on 9th April 1990 for "urgent measures in the livestock sector" aimed at restructuring production and marketing in the sector in order to adapt to the needs of the market.
To this end, a five-year fund has been established at the Ministry for Agriculture and Forests with a dotation of 340 billion lire.

OTHER NATIONAL LAWS

Law no. 64 of 1st March 1986

"Regulation of special intervention in Southern Italy".
The three year programme which followed the emanation of the law provides for specific measures in agriculture as regards development of the livestock sector, of typically Mediterranean crops and of productive forestry.
The law 64/86 is implemented by the Department for Special Intervention in Southern Italy and the Minister of Agriculture agreed on an outline programme to regulate the measures by which the two Ministries will harmonise initiatives for agriculture.

Law no. 44 of 28th February 1986

"Special measures for encouraging and developing entrepreneurial capacity amongst young people in Southern Italy".

Law no. 181 of 26th April 1982

"Arrangements for drawing up the annual and pluri-annual State budget"
This established the Fund for Invesment and Employment, implemented by the Ministry for the Budget.
For agricultural projects a consultative liaison committee was established within the Ministry for Agriculture and Forests.

PRINCIPAL ORGANISATIONS IN THE AGRICULTURAL SECTOR

PUBLIC INSTITUTIONS

- Camera dei Deputati
  XIII Commissione parlamentare per l'agricoltura
- Senato della Repubblica
  IX Commissione parlamentare per l'agricoltura e la produzione agro-alimentare
- Ministero dell'Agricoltura e delle Foreste

MAF - CONTROLLED BODIES

- Azienda di Stato per gli interventi nel Mercato Agricolo - AIMA
- Gestione ex Aziende di Stato per le Foreste Demaniali
- Lab. Centrale di Idrobiologia
- Ufficio Centrale di Ecologia Agraria e Difesa delle piante colpite dalle avversità meteoriche UCEA
- Ufficio Enologico

MAF - SUPERVISED BODIES

- AGECONTROL
- Cassa per la Formazione della Proprietà Contadina
- Ente Nazionale Cavallo Italiano ENCI
- Ente Nazionale Corse al Trotto ENCAT
- Ente Nazionale delle Sementi Elette - ENSE
- Ente Risi
- Istituti di Ricerca e Sperimentazione Agraria
- Istituto Nazionale della Nutrizione - INN
- Istituto Nazionale di Biologia della Selvaggina
- Istituto Nazionale di Economia Agraria - INEA
- Istituto per Studi e Ricerche sul Mercato Agricolo - ISMEA
- Jockey Club Italiano
- Risanamento Agro Industriale Zuccheri s.p.a. - RIBS
- Società degli Steeple Chases d'Italia
- Unione Nazionale Incremento Razze Equine - UNIRE

MINISTRY FOR AGRICULTURE

Cabinet of the Minister

Cabinet Office
Questions Office
Office for Foreign Relations
Press Office

Consultative Administration

Supreme Council for Agriculture and Forests

Secretariat of the Minister **Secretariat of Under-Secretaries**

Central Administration

- Division of General Affairs Inspectorates Legislative Coordination and Personnel
- Division of Agricultural Production
- Division for the Economic Protection of Agricultural Products
- Central Inspectorate for the Repression of Fraud
- Division for the Economy of Mountain Areas and for Forests
- Director General for Agricultural Cooperation and Agricultural Credit
- Director General for Agro-industrial Affairs and Structural Measures

REGIONAL DEPARTMENTS OF AGRICULTURE

- Ispettorati Provinciali
- Enti di Sviluppo Agricolo
- Osservatori per le malattie delle piante

OTHER BODIES

Principal public bodies

- Enti di Ricerca di carattere nazionale
  CNR
  ENEA
  ISTAT
- Camere di Commercio Industria, Artigianato e Agricoltura
- Consorzi di Bonifica, di Irrigazione e di Miglioramento Fondiario
- Istituti di Credito Agrario
- Centri interregionali di Formazione e Divulgazione Agricola
  CIFDA

Principal trade unions, producer's associations and cooperatives

- Confederazione Nazionale dei Coltivatori Diretti
  CCDD
- Confederazione Generale dell'Agricoltura Italiana
- Confederazione Italiana Coltivatori
- Federbraccianti
  CGIL
- Unione Generale Coltivatori
  CISL
- Unione Italiana Salariati e Braccianti Agricoli
  UIL
- Confederazione Cooperative Italiane
  CONFCOOPERATIVE
- Associazione Nazionale delle Cooperative e Mutue
  ANCA LEGA
- Associazione Generale Cooperazione Italiana
- Associazioni ed Unioni dei Produttori
- Associazione Italiana Allevatori e Associazioni Provinciali
- Federconsorzi e Sistema dei Consorzi Agrari Provinciali
- Unione Nazionale Costruttori Macchine Agricole
  UNACOMA

APPENDIX

4

GLOSSARY

GDP

Gross Domestic Product

Is the outcome of productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.

It does not include the value of intermediate goods and services.

VA

Value added

Is the sum of the difference between the value of production of goods and services from individual productive sectors and the value of intermediate goods and services used up in the period specified.

It coincides with the sum of remuneration of factors of production and of depreciation in each sector.

Value added **at factor cost,** as distinct from that **at market prices,** includes any subsidies erogated by the public administration to the different sectors.

VFO

The Value of Final Output

Is the value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share re-used on the holding as a means of production.

Intermediate agricultural inputs

Expenditure on intermediate agricultural inputs is that for seed, fertilisers, pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Production subsidies

Premiums and payments erogated by public bodies in favour of the agricultural sector.

UAA

Utilised Agricultural Area

Is made up of all arable land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

Total farm area

In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.

It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Access to UAA

The relationship between enterprise and farm capital. It can be:

- ownership
- rent

Type of enterprise

The relationship between enterprise

and labour. It can be:

- owner operator
- farmer with hired labour
- share-tenant
- other

Agricultural contracting
Is the supply of labour to third parties by appropriately qualified firms which may sometimes also hire out and use agricultural machinery.

WU

Work unit
According to the EEC definition for the structural surveys a Work Unit is equivalent to the work of one person who is engaged for at least 2,200 hours in the course of the year.

SGM

Standard Gross Margin
This is the parameter determined for each productive activity by the difference between the value of final product and the sum of certain specific costs(seed, fertiliser, pesticides, feedstuffs, forage, etc.), excluding those for labour and machinery.

Gross margins calculated in this way are definied as "standard" in that the value of final product and cost are calculated on a three-year average, with reference to the altimetric zone of each region. The SGM are expressed in European Units of Account (ECU) and up-dated by INEA when surveys of farm structure or the agricultural census of ISTAT take place.

TF

Type of Farming
The classification of farms by type of farming is based on determination of the economic importance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located. The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

ESU

European Size Unit
Is given by the sum of the SGM of the productive activities of the farm.
Size is measured in ESU and each Unit, for 1987, is equal to 1,200 ECU or 1,671,600 lire (1 ECU = 1,393 lire).
Thus a holding with a total SGM of 7,850 ECU has an economic size of 6.54 ESU.

USEFUL ADDRESSES

MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

Roma - via XX Settembre 20
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tel. 070/302901/305293

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Confederazione Generale dell'Agricoltura
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tel. 06/65121

Confederazione Italiana Coltivatori
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UNIRE
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tel. 06/42131

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UNACOMA
Roma - via Spallanzani 22/A
tel. 06/8449441

Unione Nazionale Imprese di Meccanizzazione Agricola
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INDEX

Foreword

Territory, population and economy

page 6

General characteristics
The agricultural area and the availability of land
Trends in GDP

Agriculture and the environment

page 10

1

The Italian agro-industrial system in 1990

page 14

The agro-industrial system
Factors of production
Intermediate inputs
Investment
Agricultural credit
Mechanisation
Employment
Agriculture

Value added
Productivity
Production
Prices and costs
The value of final agricultural output and agricultural income
The food industry
Retail distribution
Cooperation
Food consumption
Foreign trade

2

The structure of Italian agriculture

page 42

The number of farms
Access to agricultural land
Types of enterprise
Farm size
Utilisation of farm land
Irrigation
Livestock
Labour
Specialisation in production and the economic size of farm
Forests

3

The legislative and administrative framework

page 64

The roles of Central and Regional administrative bodies
Planning and the principal legislation governing intervention
Principal organisations in the agricultural sector

4

Appendix

page 74

Glossary
Useful addresses

COLOPHON

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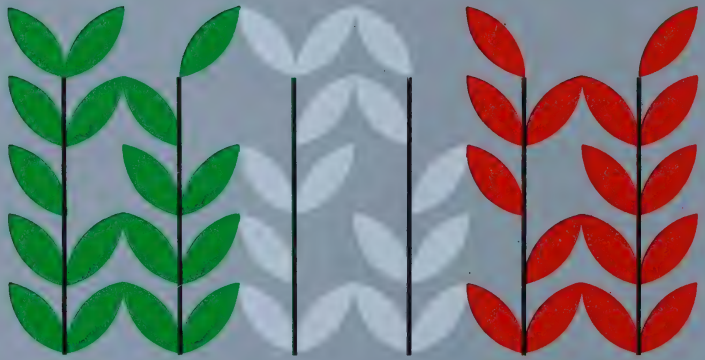

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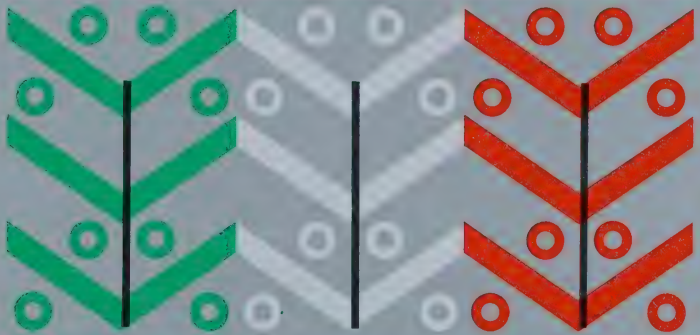

1991

ISTITUTO NAZIONALE DI ECONOMIA AGRARIA

NORTH

1 Valle d'Aosta
2 Piemonte
3 Lombardia
4 Trentino Alto Adige
5 Veneto
6 Friuli Venezia Giulia
7 Liguria
8 Emilia Romagna

CENTRE

1 Toscana
2 Umbria
3 Marche
4 Lazio

SOUTH

1 Abruzzo
2 Molise
3 Campania
4 Puglia
5 Basilicata
6 Calabria
7 Sicilia
8 Sardegna

MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ISTITUTO NAZIONALE DI ECONOMIA AGRARIA

Except where indicated, all statistics in this publication,
are from ISTAT, the Italian Central Statistical Office.
EUROSTAT data have been used for
international comparisons.

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MINISTERO DELL'AGRICOLTURA E DELLE FORESTE

ITALIAN AGRICULTURE IN FIGURES

1991

ISTITUTO NAZIONALE DI ECONOMIA AGRARIA

Giovanni Goria
Minister of Agriculture and Forests

The success of the two previous editions of "Italian Agriculture in Figures" has served to confirm the utility of the synthetic yet complete outline of the most significant trends and achievements of the Italian agricultural sector which it offers.

In view of the favourable response from operators in the sector, the Ministry for Agriculture and Forests has decided to continue its publication and this edition presents the performance of the agricultural sector in 1990.

There is another important reason for up-dating the publication:the first results of the Fourth Agricultural Census became available during the course of the year and these provide an important opportunity for examining the evolution of agrarian structures in the context of the internationalisation of markets which has characterised the last decade.

The invaluable collaboration of the National Institute for Agricultural Economics (INEA) in preparing this publication is gratefully acknowledged.

TERRITORY POPULATION AND ECONOMY

GENERAL CHARACTERISTICS

An important feature of the Italian national territory is the predominance of the hilly and mountainous areas. Over a total area of about 30 million hectares, plains account for only 23%; this figure falls to 18% in the South and to 9% in the Centre. Population has continued to increase over recent decades. The rate of population growth has, however, fallen from 0.6% at the beginning of the nineteen seveties to about 0.2% at the end of the nineteen eighties. There are considerable differences in climatic conditions over the peninsula, from the continental climate of the North to the milder sub-continental conditions of the coastal areas and the typically Mediterranean climate of the South and Islands.

TERRITORY AND POPULATION IN 1990

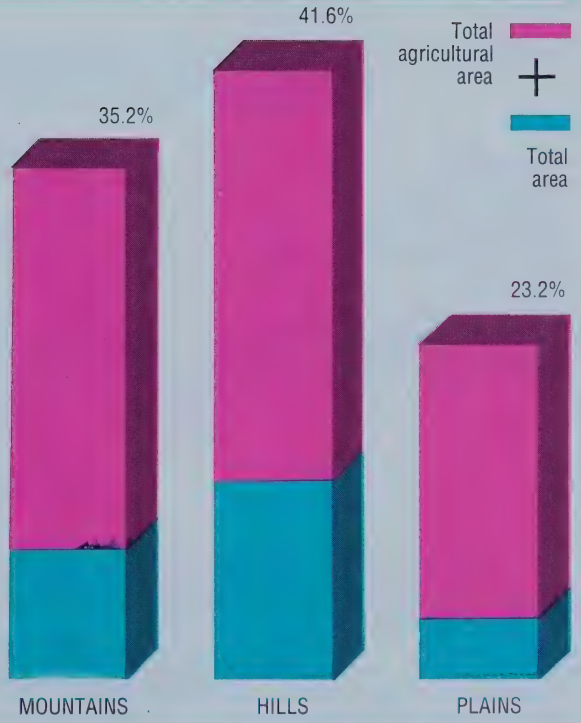
districts	total area km^2	agricultural area (1) %	population (000 units)	density no/km^2	work force (000 units)
North	119,889	46.5	25,548	213	11,209
Centre	58,344	50.8	11,007	189	4,678
South	123,046	67.4	21,184	172	8,038
Italy	301,279	55.9	57,739	192	23,925

(1) Including arable land, land under tree crops, permanent pasture, nurseries. Percentage of total land area.

TERRITORY BY ALTIMETRIC ZONE (000 ha)

zone	North	Centre	South	Italy
Mountains	5,532	1,576	3,502	10,610
Hills	2,272	3,722	6,548	12,542
Plains	4,185	536	2,254	6,975
Total	11,989	5,834	12,304	30,127

TOTAL AREA BY ALTIMETRIC ZONE



LAND USE IN ITALY AND IN EEC COUNTRIES (%)

utilisation	Italy	other Mediterranean countries (*)	other EEC (**)	total EEC
Arable land (1)	29.9	29.4	30.1	29.8
Permanent crops (2)	11.1	9.3	1.3	5.2
Vegetable gardens	0.3	0.1	0.3	0.2
Permanent meadows and pasture	16.1	12.6	27.6	21.3
Woodland	21.0	29.1	21.4	23.8
Inland waterways	2.4	1.2	1.6	1.6
Unproductive areas and other land (3)	19.2	18.3	17.7	18.1
Total area (thousand hectares)	30,127	72,879	122,882	225,888

(*) Greece, Spain and Portugal. (**) France, Fed. Rep. Germany, Benelux, Denmark, Ireland, Gt. Britain.
(1) Cropland, including temporary forage crops and fallow land.
(2) Tree crops and other permanent crops.
(3) Civilian and industrial settlements,infrastructure, rocks and bare land; "other land" includes areas abandoned or uncultivated, ornamental parks and gardens, farm areas occupied by buildings, courtyards and farm roads.
Source: EEC - The state of agriculture in the European Economic Comunity 1990.

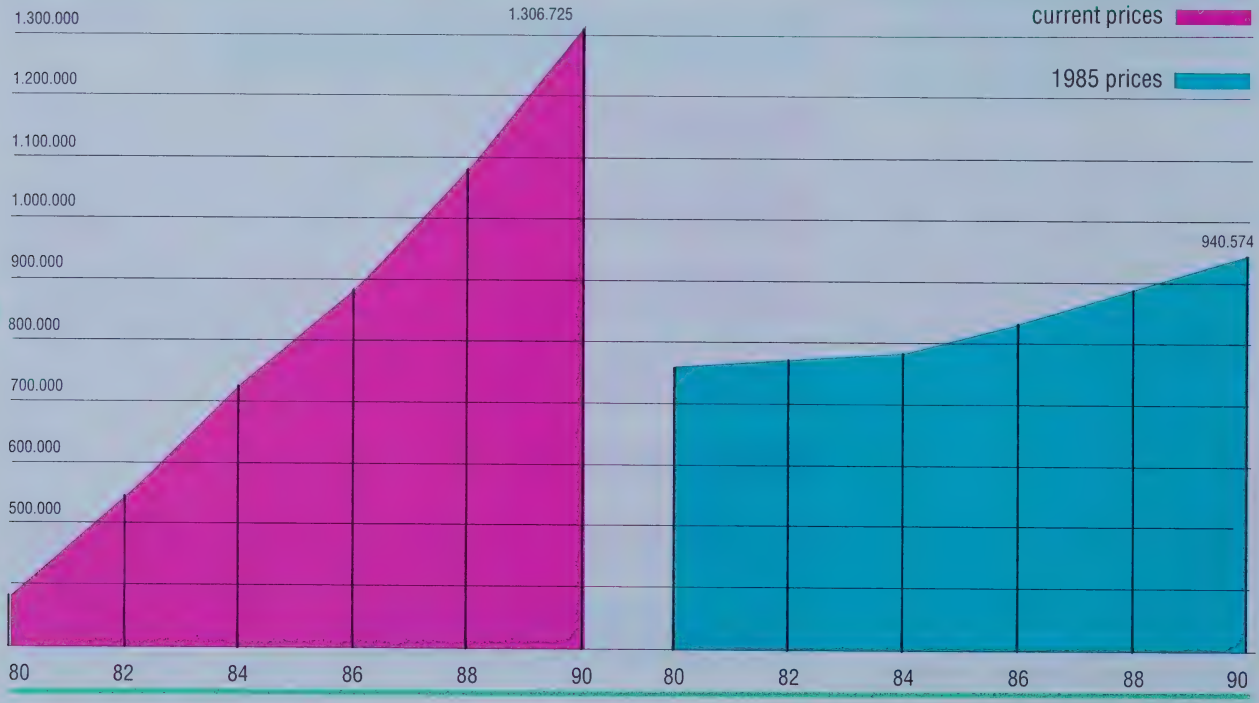
THE AGRICULTURAL AREA AND THE AVAILABILITY OF LAND

The process of urbanisation is progressively absorbing land in Italy. Unproductive areas, mainly residential and for infrastructure, are increasing and are estimated at about 2.8 million hectares or 9% of total national territory.

The agricultural area, on the other hand, is continuously decreasing: from 1970 to the present time the utilised agricultural area (UAA) diminished by more than two and a half million hectares (-14%) according to Census figures. This is a phenomenon which affects all developed and newly industrialised countries. Land is thus becoming an ever-more precious resource, especially in countries which, like Italy, have a high population density and where national territory is subject to considerable variations in altitude.

RATIOS OF POPULATION TO AGRICULTURAL AREA

GROSS DOMESTIC PRODUCT, 1980 - 1990 (billion lire)



GDP PER CAPITA AND PER WORK UNIT (thousand lire)

AGRICULTURE AND ENVIRONMENT

There is a growing awareness of environmental problems both at national and at Community level.
Amongst the more important provisions at national level are:

The three year programme for the environment, approved by the Law of 28th August 1989 no. 305 which provides finance for up to 1614 billion lire in the three year period 1989-91, to which further funds will be added specifically for national parks.
The most important aspect of the three-year programme is the effort made to bring the different tasks and responsibilities involved in environmental management into a unified and coordinated framework, at the same time increasing the resources available. Apart from extension of protected areas, the greatest emphasis has been given to combatting air and noise pollution in urban areas, to financing schemes for counteracting pollution in certain large water basins including the Tiber valley, the Arno, the Liri-Garigliano and the Volturno, to the development of employment in activities for environment in the South, to promoting public awareness, to a project for setting up an information system for the environment and for up-dating the geological map of Italy.
As regards agriculture, the Plan foresees intervention to favour the use of marginal land, amongst other things for new types of livestock rearing, the encouragement of organic agriculture and free-range livestock raising.

Law no. 183 of 18th May 1989 which approves **provisions for the protection of land resources.**
The Law provides for the division of the total land area into hydrographic basins at national, inter-regional and regional levels and indicates as the instrument for acheiving protection of land resources the Plans for each of the basins.

The decree on **urgent measures for the improvement of water quality and prevention of pollution** which lays down quality requisites and regulates the sale and use of herbicides and fertilisers in certain zones.

Law no. 57 of 19th March 1990 which establishes **an Authority for the Adriatic** with the task of adopting and coordinating emergency measures and research

PROTECTED AREAS

Five national parks have been set up in Italy:

Gran Paradiso
70,000 ha

Stelvio
134,620 ha

Abruzzo
40,000 ha

Circeo
8,400 ha

Calabria
15,435 ha

In addition, there are nature reserves, regional nature parks and areas protected under international conventions (wetland areas, totally protected areas, biosphere reserves, bio-genetic reserves, specially protected areas in the Mediterranean). The following national parks have been provided for, though not yet established, under the Financial Law for 1988:

Dolomiti Bellunesi
250 square km

Monti Sibillini
450 square km

Parco Marino del Golfo di Orosei
220 square km

The three year Plan of the Ministry for the Environment provides for the establishment of the national park of Aspromonte (1000-2000 square km) and for inter-regional parks such as that of the Po Delta (1000 square km), the Foreste Casentinesi (300 square km) and the Archipelago Toscano (105 square km). With the Framework Law on protected areas the following national parks should be established:

Alpi Marittime
500 square km

Area Tarvisio
400 square km

Area Vesuvio
400 square km

Gennargentu
1000 square km

Area degli Alburni
700 square km

Area Cervati-Gellison (Salerno)
800 square km

Moreover almost all Regions have established parks or regional nature reserves. At present, areas protected amount to 6.5% of the national land area.

PROTECTED AREAS IN ITALY

	national parks	state reserves	humid zones	total area protected by the State (ha)	regional parks	regional reserves
Valle d'Aosta	1	-	-	37,000	1	-
Piemonte	1	2	-	36,383	17	19
Lombardia	1	1	6	65,985	18	64
Alto Adige	1	-	-	53,447	7	-
Trentino	1	-	1	19,386	2	3
Veneto	-	18	1	21,631	3	-
Friuli-Venezia Giulia	-	3	2	2,072	(b)	(b)
Liguria	-	1	-	16	5	2
Emilia-Romagna	-	17	10	30,515	10	2
Toscana	1	28	3	119,832	3	-
Marche	1	2	-	58,117	1	-
Umbria	1	-	1	19,157	(c)	(c)
Lazio	2	7	5	16,385	12	10
Abruzzo	1	14	-	48,596	1	7
Molise	1	3	-	1,640	-	-
Campania	-	4	-	1,978	1	-
Puglia	-	16	3	9,846	-	-
Basilicata	-	8	-	961	1	7
Calabria	1	16	1	31,938	1	2
Sicilia	-	3	2	6,056	2	19
Sardegna	-	1	8	14,147	-	-
Italy	7	145	43	595,088	84	136

other protected areas regional or private	total area protected by regions (ha)	total protected area (e) (ha)	% of total regional areas protected
-	3,500	40,500	12.41
3	114,534	150,917	5.94
17	418,593	480,417	20.14
110	114,768	168,215	22.73
18	82,472	101,858	16.38
1	34,200	55,690	3.03
(b)	(b)	2,072	0.26
2	43,263	43,279	7.99
-	121,149	128,937	5.83
1	91,880	211,712	9.21
-	6,000	64,117	6.62
(c)	(c)	19,157	2.26
5	90,375	106,760	6.21
2	57,238	105,834	9.80
-	-	1,640	0.37
1	520	2,498	0.18
1	424	10,270	0.53
-	81,577	82,538	8.34
1	(d)	31,938	2.12
-	110,846	116,902	4.49
2	3,316	17,463	0.73
153	1,374,655	1,942,714	6.50

(a) Recognised under the Ramsa Convention.

(b) Safeguard provisions are operating in 4 parks and 5 areas for environmental protection (altogether 65,550 hectares) out of the total of 14 and 76 respectively.

(c) The "System of Environmental Parks in Umbria" has recently been approved (DPGR no. 31/1990) and provides for the establishment of parks in eight chosen areas for a total of 92,700 hectares.

(d) The enabling provision do not define the perimeters of the areas: information about the size of the area is therefore unavailable.

(e) The total area protected in some Regions does not correspond with the sum of the sub-totals since some areas are protected both by the State and by the Region.

Source: CNR - Data-bank for Protected Areas in Italy, situation in November 1990.

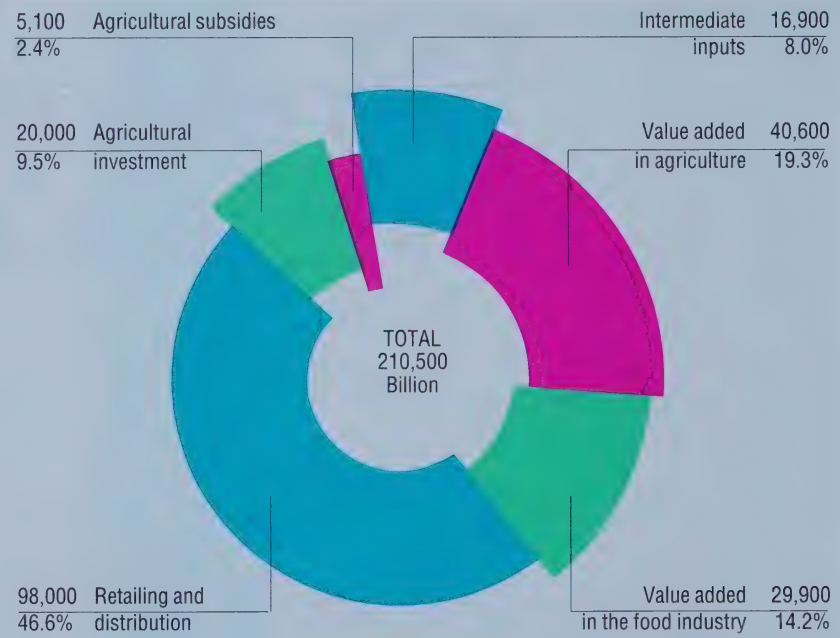
1

THE ITALIAN AGRO-INDUSTRIAL SYSTEM IN 1991

THE AGRO-INDUSTRIAL SYSTEM

The agro-industrial system constitutes a set of activities where agriculture interacts with all those sectors which are linked to it, both upstream (the production of inputs: fertilisers, pesticides, feed compounds, energy etc.) and downstream (food and catering industries). The whole system is connected with a dense trading and distribution network. Estimates based on national accounts set the value of the agro-industrial complex in 1990 at 210,000 billion lire, of which 46,000 attributable to value added in agriculture, 17,000 to intermediate inputs, 20,000 to agro-industrial investment, 30,000 to value added in the food industry and 98,000 to the trading and distributive sector. Services supplied by the public sector are not included in the estimates, even though they make an important contribution to the system.

THE MAIN AGGREGATES OF THE AGRO-INDUSTRIAL SYSTEM(*)



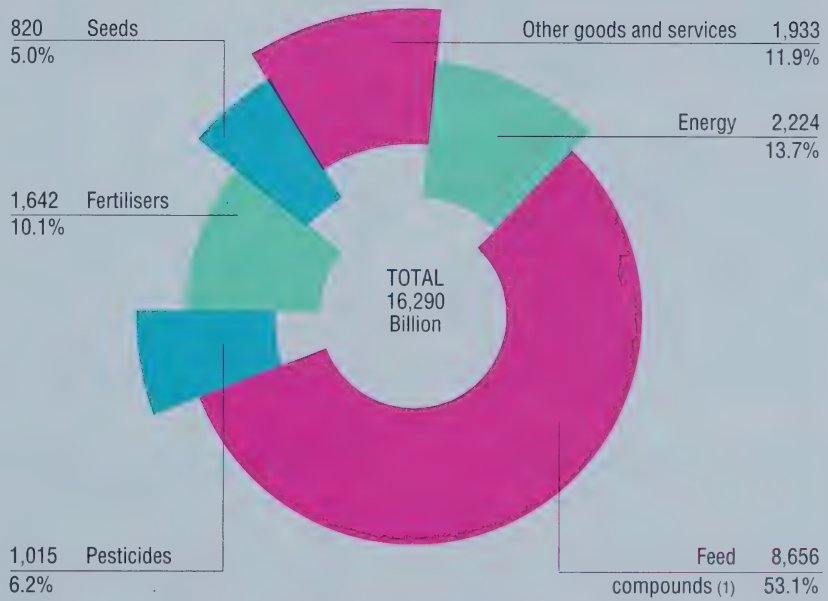
(*) Estimates refer to food production and include both forestry and fish.

FACTORS OF PRODUCTION

INTERMEDIATE INPUTS

Expenditure for the livestock sector represents the highest proportion of the total for intermediate inputs. During the nineteen eighties the rate of increase in the use of current inputs and services slowed down. In 1990 this trend continued: intermediate inputs in real terms fell by about 1%. All the main categories of goods and services were affected by the decline, from those typically of agricultural origin (seeds and animal feedstuffs) to those provided mainly by non-agricultural sectors (fertilisers, pesticides, energy and various services).

INTERMEDIATE INPUTS BY MAIN TYPE



(1) Including other expenditure for livestock.

INVESTMENT

According to first estimates, agricultural investment in real terms fell once more in 1990, reflecting the unfavourable economic climate. In the first half of the nineteen eighties, in particular, it had shown a slowing trend.

Its share of total gross fixed investment has fallen, and, as a ratio to agricultural value added, it was lower at the end of the decade than at the beginning.

The table shows the time series revised by ISTAT for the period 1980-1989; for 1989-90 the estimates have been carried out by INEA.

TRENDS IN AGRICULTURAL INVESTMENT 1980-1990 (*)

years	value at current prices (billion lire)	value at constant 1985 prices (billion lire)	% of total gross fixed investment 1985 prices	agricultural investment as % VA in agriculture
1980	7,465	13,928	7.9	36.3
1981	8,645	13,319	7.8	34.9
1982	9,228	12,289	7.6	33.0
1983	10,537	12,642	7.9	30.9
1984	11,581	12,657	7.6	32.6
1985	12,233	12,233	7.3	31.2
1986	13,104	12,410	7.2	31.2
1987	13,611	12,225	6.8	29.5
1988	16,117	13,666	7.1	34.0
1989	15,800	12,700	6.3	31.3
1990	16,570	12,450	6.0	32.2

(*) Including forestry and fishing.

AGRICULTURAL CREDIT

In 1990 the amount of credit erogated by Institutes authorised to grant loans for agriculture reached 20,000 billion lire, an increase of 11% over that of 1989. The Special Institutes were responsible for 48% of total credit, an increase of 15% over 1989.

Loans for working capital increased by 20% on account of the expansion in subsidised loans from authorised Institutes.

Loans for improvements showed a marked decrease (-28.5%) due to a sharp cut in subsidised loans by authorised Institutes.

Altogether the share of subsidised to total loans is decreasing, reflecting the shortage of public funds allocated to agriculture.

EROGATIONS

type of credit	1989		1990	
	billion lire	% of credit subsidised	billion lire	% of credit subsidised
Working capital	14,955	49.4	17,846	46.0
Farm improvements	2,982	69.7	2,133	51.6
Total	17,937	52.8	19,979	46.6

LEVELS OF INDEBTEDNESS IN AGRICULTURE

	1985	1986	1987	1988	1989	1990
Agrarian credit (billion lire)	18,317	21,878	23,435	25,466	27,153	27,750
% VFO	37.5	43.1	44.7	49.1	49.6	50.7

Source: processed on data from Bank of Italy.

MECHANISATION

Between 1980 and 1989 the national stock of farm machinery expanded by more than 20% and by as much as 31% in southern areas.
More widespread mechanisation has enabled the farmer to carry out operations with greater efficiency and punctuality and more productively. In the same period of time, it must be added, the amount of labour employed fell by 25% in terms of work units. There was a marked increase in the use of all main categories of machines, and particularly of small motorised machines. In the South the increase in mechanisatiobn showed an increase even more pronounced than in the rest of the country for all the main types of machinery.

THE STOCK OF AGRICULTURAL MACHINES AND CHANGES SINCE 1980 (*)

type	North		Centre		South		Italy	
	no.	% change	no.	% change	no.	% change	no.	% change
Tractors (1)	786	23.6	278	33.7	339	46.0	1,403	30.4
Combined harvesters	25	28.8	10	33.1	12	37.2	47	31.7
Mowers and other motors (2)	537	5.1	209	16.1	501	24.9	1,247	14.2
Small agric. machines	76	46.8	30	53.2	79	63.8	185	54.7
Other machines and other motors	186	11.0	89	14.8	234	16.3	509	14.6
Total	1,610	16.2	616	25.6	1.165	30.7	3,391	22.5

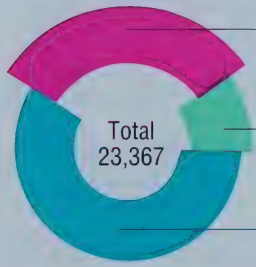
(*) Numbers in thousands at 31-12-1989.
(1) Including accessories.
(2) Motorcultivators and motorhoes.
Source: UNACOMA.

EMPLOYMENT

The structure of employment has changed considerably over time: in 1970 agriculture and industry accounted for about 60% of total employment; in 1990 the situation was completely reversed and the service sector absorbed 60% of employment. Between 1970 and 1990 the number of agricultural workers, in terms of work units, decreased by 1,529,000 (-40.7%) passing from 19% to about 9.5% of total employment. In the same period the ratio between agricultural employment and total population steadily changed: in 1970 it was one to fourteen, in 1990, one to twenty six.

In industry the corresponding ratio remained almost stationary, whereas in the service sector change was in the opposite direction. In 1990 33.4% of agricultural workers were wage employees.

WU PER SECTOR (thousands)



Industry	6,940	29.7%
Agriculture	2,231	9.5%
Services	14,196	60.8%

WORK UNITS TO TOTAL POPULATION BY SECTOR

AGRICULTURAL WORK UNITS IN THE EEC

Source: processed on EUROSTAT and ISTAT data.

AGRICULTURE

VALUE ADDED

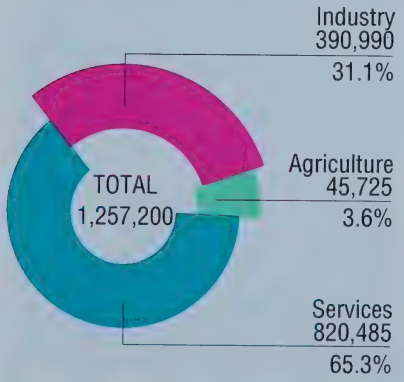
In 1990 the direct contribution of the primary sector to total value added at factor cost was 3.6%. At constant prices, value added at factor cost in agriculture fell from 8.1% in 1970 to 5.2% in 1980 and to 4.2% in 1990.

In the same period the contribution of the service sector increased whilst that of industry remained stationary.

In Italy the agricultural sector is relatively more important, both in terms of value added and in terms of employment, than in other industrialised countries.

Trends in the latter variables which have emerged in recent years, however, bring Italy closer to the positions of the other countries of North and Central Europe.

VA BY SECTOR (billion lire)



THE SHARE OF AGRICULTURE IN THE NATIONAL ECONOMY

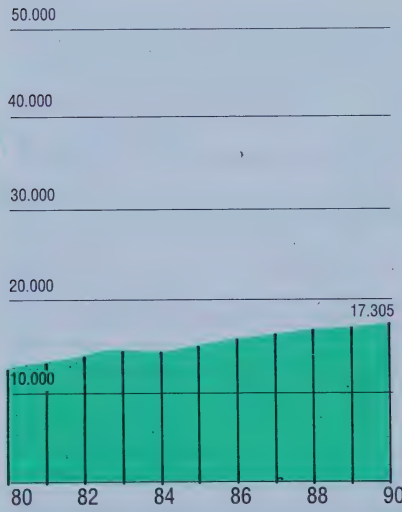
INTERNATIONAL COMPARISONS

countries	value added %	no.s employed %
Italy	(*) 4.1	(*) 9.3
France	3.2	6.4
Spain	5.1	13.0
Greece	16.4	26.6
Fed. Rep. of Germany	1.6	3.9
Netherlands	4.2	4.7
United Kingdom	1.4	2.2
EEC	3.0	7.0
USA (1)	2.1	2.4
Japan(1)	3.0	6.8

(*) EUROSTAT data which differs from ISTAT data previously cited on account of different methods of calculation.
(1) *Source:* FAO.

PRODUCTIVITY

In 1990 value added per work unit at factor cost in constant prices amounted to 40% of that in industry and to 37% of the average in the marketable service sector (trade, transport, credit, tourism and other services).



VA/WU BY SECTOR AT 1985 PRICES (thousand lire)

PRODUCTION

Weather was extremely unfavourable to agriculture during 1990: there was drought, particularly in the South, frost and violent storms in the Centre and North.

The value of final output fell in real terms by more than 3%, cancelling the limited recovery that had taken place in 1989.

The drop in output was mainly concentrated in tree crops where the value of final output fell by more than 13%. The collapse in olive production (-65,7%) was particularly striking and is linked with the two year production cycle as well as with damage from a particular type of insect. Vine production also fell, by 9.1% as compared with the 1988-89 season, and both desert grapes and grapes for wine were affected.

Amongst citrus crops, the contraction in production was particularly severe for oranges. As regards fruit production, increases were registered particularly for pears and actinidia, whilst production of nuts, walnuts and hazelnuts fell.

In the field crops sector there was a marked recovery in several cereal crops, especially durum wheat, which offset the decline in other sectors. Horticultural crops suffered from bad weather, drought and parasites which caused yields to fall. Neverthless, the quality both of fruit and of vegetables was high and this contributed to keeping prices at a satisfactory level.

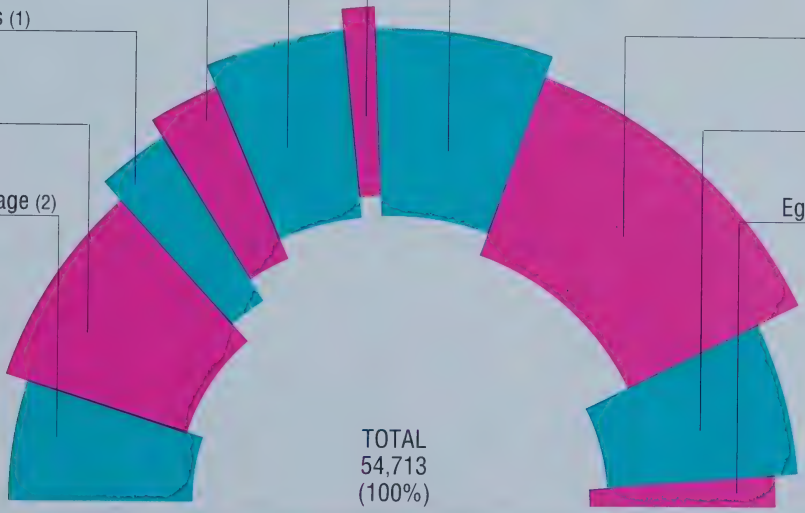
VALUE OF FINAL AGRICULTURAL OUTPUT BY SECTOR

	North		Centre		South		Italy	
	billion lire	%	billion lire	%	billion lire	%	billion lire	%
Field crops(1)	8,234	28.9	3,648	45.3	7,979	42.4	19,861	35.9
Tree crops	5,270	18.5	1,663	20.6	6,435	34.2	13,368	24.2
Livestock	14,550	51.1	2,641	32.8	4,293	22.8	21,484	38.8
Forestry	407	1.5	109	1.3	115	0.6	631	1.1
Total	28,461	100.0	8,061	100.0	18,822	100.0	55,344	100.0

(1) Including forage.

VFO PER SECTOR - COMPARISONS WITH EEC (% values)

THE VALUE OF FINAL AGRICULTURAL OUTPUT BY MAIN PRODUCTIVE SECTOR (billion lire)



5,220 Grapes	9.5%
2,791 Flower and nursery production	5.1%
2,913 Industrial crops (1)	5.3%
9,145 Vegetables	16.7%
5,548 Cereals and forage (2)	10.1%
Olives 962	1.8%
Fruit and citrus 6,650	12.2%
Meat 13,587	24.8%
Milk 6,532	11.9%
Eggs and other 1,365	2.5%

TOTAL
54,713
(100%)

(1) Sugar beet, tobacco, textile fibres and other industrial products.

(2) Forage crops amount to L.143 billion and dried pulses to L. 116 billion.

PRODUCTION OF MAIN CROPS AND CHANGES AS COMPARED WITH 1989

Crop	area		yield	harvest		final output	
	000 ha	% ch.	q/ha	000 t.	% ch.	billion lire	% ch.
Soft wheat	1,071	-6.3	42.1	4,445	2.3	1,306	-4.1
Hard wheat	1,702	-5.4	22.0	3,663	19.5	1,446	16.0
Maize	768	-4.5	77.1	5,864	-7.8	1,452	-1.7
Rice	213	3.4	60.1	1,282	2.9	677	-6.8
Sugar beet	281	-7.0	499.1	13,800	-18.3	882	-16.3
Tobacco	106	-	18.6	194	-1.5	762	1.3
Soya	515	8.0	29.5	1,498	-7.8	1,051	0.3
Sunflowers	146	8.1	21.0	301	-11.5	181	2.7
Potatoes (early and common)	121	-3.2	197.4	2,338	-4.9	887	4.8
Tomatoes	137	2.2	462.1	5,577	-2.7	1,390	6.8
Grapes (dessert and vine)	1,051	-2.0	87.1	8,434	-10.6	-	-
Wine (000 hl.)	-	-	-	55,457	-8.1	4,632	9.7
Olives (table and for oil)	1,158	0.4	9.3	1,020	-65.9	-	-
Oil (000 ql.)	-	-	-	175	-69.0	793	-66.9
Apples	84	1.2	268.0	2,040	6.0	1,226	15.8
Pears	51	2.0	228.0	969	28.3	702	28.3
Peaches and nectarines	113	0.9	180.9	1,722	6.9	1,341	15.6
Oranges	104	3.9	180.5	1,851	-10.4	990	5.3
Lemons	39	-	172.1	620	-7.4	498	6.6
Mandarines and clementines	32	-	157.7	477	7.2	305	8.2
Actinidia	20	5.3	196.2	326	35.8	658	23.2

(1) Data for 1990 are provisional.

Industrial crops showed a significant decline (-2.5%) which hit oilseeds (sunflower) and sugar beet particularly hard. Pulses experienced a further drop in output (-4.7%). Flower production also decreased.

Livestock production continued to show fairly limited increases (0.2%) in line with trends in recent years. Overall meat production increased by 1.4% as a result of an increase in the production of beef for increased slaughterings. These were the outcome of poor market trends and the application of Community programmes for limiting milk production.

MAIN LIVESTOCK PRODUCTS

AND CHANGES AS COMPARED WITH 1989

product	numbers		production (6)		final output	
	000 head	% ch.	000 t.	% ch.	bill. lire	% ch.
Cattle (1)	8,685	-2.0	1,530	0.6	5,301	-2.8
Pigs	9,119	-1.5	1,483	2.0	3,543	2.0
Sheep and goats	12,855	+0.4	96	6.0	414	6.0
Poultry (2)	173,600	+3.5	1,380	2.6	3,112	4.1
Rabbits (3)	-	-	330	1.7	1,113	4.1
Eggs (4)	-	-	11,000	-5.5	1,313	6.8
Cows milk (5)	-	-	9,453	-1.7	5,861	2.3
Sheep and goats milk (5)	-	-	587	1.3	671	2.3

(1) Including buffaloes.
(2) Laying hens, hens, turkeys, guinea fowl. *Source:* UNA.
(3) Including game.
(4) Production in millions.
(5) Production in 000 hl., buffalo milk included with cows' milk.
(6) Live weight for meat.

PRICES AND COSTS

During the nineteen eighties the rate of increase in producer prices has remained in line with that for intermediate inputs.In contrast, it was considerably lower than those for investment goods and for labour.
In 1990 the increase in agricultural prices was a little more than 3%, less than half that of the GDP deflator (7.5%).

INDEX NUMBERS (base 1980 = 100)

VFO AND AGRICULTURAL INCOME

Disaggregating the value of final output (VFO) including subsidies we find that 27% of the total is accounted for by intermediate inputs (seed, fertiliser, feed concentrates, energy etc.) and 22% by wages.
Subsidies paid by State and by the EEC account for about 8%. About 31% of gross VFO went to self-employed labour (farm entrepreneurs and family workers) gross of other related expenses.
Agricultural incomes are lower than the average for the economy as a whole: wages for employed labour are 50% lower whilst income for self-employed workers, net of depreciation and other management expenses are equivalent to about one fifth of the national average.

THE STRUCTURE OF AGRICULTURAL INCOME (billion lire)

58,130 Final output (1)
16,999 Intermediate inputs
563 Indirect taxes on production
12,000 Depreciation
13,946 Wages
Production subsidies 5,157
Gross value added at market prices 41,131
Gross value added at factor cost 45,725
Net value added at factor cost 33,725
Net operating profits 19,779

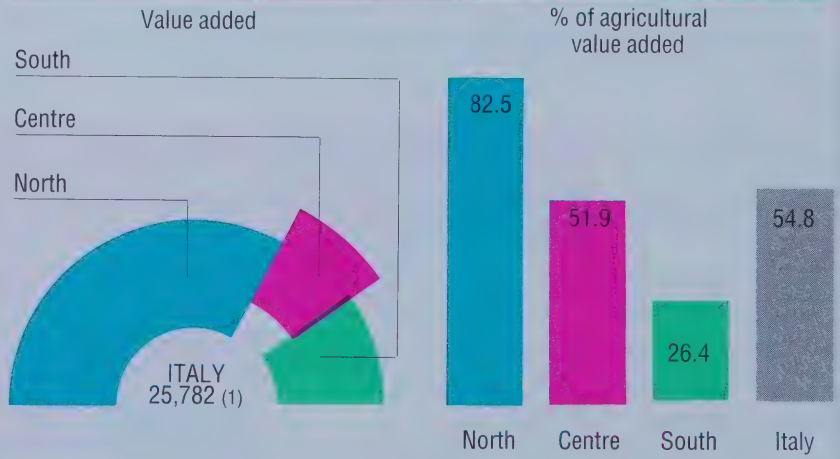
(1) Including forestry and fishing. *Source:* Calculation on ISTAT and EUROSTAT data.

THE FOOD INDUSTRY

The food industry is an expanding branch of manufacturing despite a certain slowing down in pace during 1990. Value added at factor cost increased in real terms at an average rate of 2.1% per year between 1980 and 1990, as compared with an almost stationary trend in agriculture. As a ratio of value added in agriculture, that of the food industry increased in nominal terms from about 39% to 56%, demonstrating the increasing importance of the processing sector in the agro-food chain. The market for industrial food products is in continuous expansion and attracts considerable investment, both Italian and foreign. We are, moreover, witnessing a growing concentration of firms within the industry and an imposing presence of large multinational groups.
At the same time, strong regional differences remain, with processing activities concentrated in the Centre-North. There are also
theCentre-North. There are also structural problems due to a high number of firms of inadequate size and to those using inappropriate technology. In the EEC area, the agro-food industry is an important sector both for employment and for value added.

In order to give a more detailed account of it, reference has been made to statistics available only for years preceding 1990.

VALUE ADDED IN THE FOOD INDUSTRY BY DISTRICT (*)



(*) Value added at factor cost, including beverages and tobacco.
(1) The total differs from that of page 18 which is at market prices.

ECONOMIC AGGREGATES OF INDUSTRIAL FOOD ENTERPRISES WITH AT LEAST 20 EMPLOYEES (*)

sectors	turnover billion lire		gross product billion lire	investment billion lire	numbers employed
	total	% exported			
Milling and pasta (1)	7,068	15.5	1,109	329	16,621
Biscuits and bread	4,157	6.6	1,201	228	21,793
Fruit and vegetables	3,946	25.9	687	181	18,464
Oils and fats	4,701	6.8	295	185	6,429
Butchery and meat processing	10,876	5.0	1,696	340	30,206
Dairy products	8,420	3.9	1,425	301	21,638
Sugar refining	2,516	7.3	409	206	6,001
Confectionery	4,182	10.0	1,403	225	20,239
Various (2)	4,762	6.1	1,158	172	15,693
Fish products	1,003	5.6	176	50	4,195
Wine and alcoholic beverages	4,580	20.2	943	187	11,947
Beer and malt	1,519	0.5	410	93	5,625
Mineral water and soft drinks	2,866	1.4	935	186	9,018
Animal feedstuffs	5,087	4.5	577	94	7,100
TOTAL	65,683	8.7	12,424	2,777	194,969

(*) Excluding fish products and tobacco industry.
(1) Including starch products.
(2) Food extracts, dietary products, coffee, tea, etc.
Source: calculated on ISTAT data, 1988.

THE FOOD INDUSTRY IN THE EEC (% values)

country	output	employment
Italy	13.5	9.0
France	20.7	15.4
Fed. Rep. Germany	18.5	19.5
Benelux	9.2	9.0
Denmark	3.4	3.2
United Kingdom	20.0	21.5
Spain	9.8	14.6
Other (1)	4.9	7.8
EEC	352,838 (000 Ecu)	2,202.6 (000 units)

1 Ecu = 1,510 Lire.
(1) Ireland, Greece, Portugal.
Source: EEC Commission.

TRENDS IN PRODUCTION IN ITALY

Sectors	1988/90
Milling and pasta	↑
Biscuits and bread	↑
Fruit and vegetables	—
Vegetable and animal fats	↑↑
Butchery and meat processing	—
Dairy products	—
Sugar refining	↓
Confectionery	↑↑
Frozen foods	↑
Various	↑
Liqueurs	↓
Mineral water and soft drinks	↑↑
Beer and malt	—
Animal feedstuffs	—

RETAIL DISTRIBUTION

In 1990 30% of all wholesalers, 35% of retail shops and 33% of mobile shops were operating in the food distribution sector.The sales area of food supermarkets amounted to 2.3 million square metres where 65,000 persons were employed. An interesting process of rationalisation has been under way for several years in which the number of retailers is falling and modern retailing is expanding. In Italy only a little more than 30% of food expenditure passes through the modern retailing sector as compared with an average of about 70% in France, Germany, Great Britain and Japan. The percentage may be expected to rise in the near future, as the average size of supermarket is tending to increase.

FOOD MARKETING CHANNELS BY DISTRICT

	North		Centre		South		Italy	
	no.	%	no.	%	no.	%	no.	change% on 1981
Wholesale	18,181	48.8	6,374	17.1	12,688	34.1	37,243	+8.5
Retail								
Ordinary	130,123	42.4	61,245	20.0	115,108	37.6	306,476	-13.4
Mobile	16,332	44.2	7,910	21.4	12,702	34.4	36,944	-38.2
Supermarkets	1,798	56.6	619	19.5	759	23.9	3,176	+108.8

Source: calculated on data from Ministero Industria, Commercio e Artigianato.

COOPERATION

Cooperation in the agricultural sector involves about 24,000 societies and about 25-30% of the value of final output. In the period 1979-89 the number of cooperative enterprises increased by 30%, a higher rate of increase than in other sectors of the economy. At the moment, they constitute a little more than 15% of all cooperative societies enrolled on the national register. Recent trends show a higher growth rate in southern areas.

Despite the expansion, however, there are several causes for concern within the movement, related to management ability, productive efficiency and financial backing. Forms of collaboration with the processing industry (limited companies, joint ventures etc.) have recently become extremely important.

AGRICULTURAL COOPERATIVES BY MAIN CATEGORY AND

category	North	Centre
Ploughing etc.	696	754
Forestry (1)	266	157
Dairy	2,339	132
Wine cellars (2)	382	146
Oil presses	38	164
Jam, marmalades etc.	19	16
Fruit and vegetables, harvesting, processing, marketing	586	230
Milling and processing cereals	35	24
Livestock raising and meat preparations	914	476
Silkworm farming	19	2
Cultivation and first processing tobacco	15	45
Grain storage	15	1
Sale of agricultural produce	162	115
Machinery hire	507	68
Marketing farm inputs (3)	341	110
Various (4)	498	235
Raising and marketing small animals (5)	86	61
Farm improvements (6)	591	675
Other	36	48
Total	7,545	3,459

(1) Including flower and nursery production. (2) Including distilleries. (3) Including Consorzi Agrari.
(4) Social assistance, services for members, disinfestation.
(5) Including storage, processing and sale of produce delivered by members.
(6) Cultivation and first-stage processing of cotton and joint services for land reform areas.
Source: calculated on data from Ministero del Lavoro e Previdenza Sociale, 31 December 1989.

DISTRICT

South	Italy
2,683	4,133
179	602
386	2,857
659	1,187
541	743
25	60
1,844	2,660
23	82
1,064	2,454
9	30
127	187
2	18
191	468
141	716
385	836
739	1,472
168	315
3,616	4,882
307	391
13,089	24,093

FOOD CONSUMPTION

In 1990 household expenditure on food amounted to more than 156,000 billion lire, slightly less than one fifth of total expenditure. The percentage of food to total expenditure has steadily fallen over time. If, in addition to food consumption at home, that outside the home (in restaurants and canteens) is considered, total expenditure rises significantly and amounts to between 180,000 and 190,000 billion lire, including the expenditure of foreign tourists in

THE PATTERN OF FOOD CONSUMPTION

products	% food expenditure	annual average rate of ch.1980/90 quantity (%)	price (%)
Bread and cereals	11.9	0.49	9.35
Meat	27.6	0.26	8.12
Fish	6.3	3.21	10.59
Dairy produce and eggs	14.2	1.32	9.06
Fats and oils	3.8	0.57	7.55
Horticultural produce (1)	22.1	0.86	8.34
Other (2)	6.5	1.57	7.32
Alcoholic beverages	5.6	0.97	9.43
Non-alcoholic beverages	2.0	6.37	9.31
Total	100.0	0.83	8.56

(1) Including patatoes.
(2) Coffee, tea, cocoa, sweets, etc.

Italy. The most important item of household food expenditure is meat, which, at 43,000 billion lire accounted for almost 28% of the total. This is followed by horticultural products with an expenditure of more than 34,000 billion lire (22%); dairy products and eggs with 21,000 billion lire (14%); derivatives of cereals with 18,600 billion (11.9%); fish with 9,800 billion (6.3%) wine and other alcoholic beverages with 8,700 billion (5.6%). Between 1980 and 1990 the relative weight of expenditure on household food consumption shows the following trends:

meat

dairy produce and eggs

fruit and vegetables

wine and alcoholic beverages

fish

FOOD CONSUMPTION IN THE EEC (kg. per head)

products	Italy	France	Spain	Greece	Fed.Rep. Germany	United Kingdom	EEC
Cereals (1)	115	79	72	106	75	81	84
Rice	5	4	6	5	2	3	4
Potatoes	39	73	97	87	72	109	79
Vegetables (2)	167	120	182	205	83	69	117
Fruit inc. citrus (2)	130	79	82	93	137	64	94
Milk (3)	75	101	110	54	92	128	n.d.
Cheese	15	22	4	23	16	7	n.d.
Butter	3	9	-	2	8	5	n.d.
Total meat	88	110	94	84	100	74	87
Beef	27	30	12	24	23	19	22
Pork	31	37	45	23	59	24	39
Fats and oils	30	22	28	34	21	30	27
Sugar (4)	26	34	24	33	33	40	32
Wine (5)	71	73	46	33	26	12	42

N.B. Data refers to the crop year 1988-1989; for dairy products, oils and fats to 1988; for meat to 1989.
(1) In flour equivalent.
(2) Including processed.
(3) Including other fresh products.
(4) White sugar equivalent.
(5) Litres per head.

The strong Mediterranean component in the Italian diet is clearly indicated in levels of per capita consumption. As compared with the EEC average, in Italy consumption per head is 40% higher for cereals and 70% for wine; in contrast,consumption of milk and pork is about 20-25% less. Consumption of other products, beef and cheese, is more or less in line with European standards.

FOREIGN TRADE

Overall agro-food production is lower than consumption and therefore the sectoral balance of trade is constantly in deficit; the rate of self-sufficiency has fallen and has levelled out, from1980 onwards, to about 80%.

THE AGRO-FOOD BALANCE AND THE AGRO-INDUSTRIAL SYSTEM (billion lire at 1990 prices)

	1970	1980	1990
MACRO-ECONOMIC AGGREGATES			
Total agro-industrial production (1)	81,044	87,228	87,436
Imports	19,631	28,332	30,268
Exports	6,593	10,250	13,455
Balance	-13,038	-18,082	-16,813
Volume of trade (2)	26,224	38,582	43,723
Apparent consumption (3)	94,082	105,309	104,249
INDICATORS			
Degree of self-sufficiency (4)	86.1	82.8	83.9
Propensity to import (5)	20.9	26.9	29.0
Propensity to export (6)	8.1	11.8	15.4
Degree of trade cover (7)	33.6	36.2	44.4

(1) VFO agriculture, forestry, fishing and value added in the food industry.
(2) Sum of imports and exports .
(3) Agro-industrial production, plus imports, minus exports.
(4) Ratio between production and consumption.
(5) Ratio between imports and consumption.
(6) Ratio between exports and production.
(7) Ratio between exports and imports.

FOREIGN TRADE BY MAIN CATEGORY

OF AGRO-FOOD PRODUCT (billion lire)

product group	imports	exports	balance
CROPS	6,987	3,881	-3,106
Cereals	2,116	88	-2,028
Wheat	1,455	36	-1,419
Maize	435	26	-409
Vegetables	601	851	250
Fruit	1,037	2,265	1,228
Citrus	44	119	75
Coffee, tropical beverages	818	20	-798
Oilseeds	442	17	-425
Uncured tobacco	218	156	-62
Cotton	766	17	-749
LIVESTOCK	4,001	50	-3,951
Live animals	2,361	15	-2,346
Milk	925	8	-917
FOREST PRODUCTS	1,228	84	-1,144
FISH and GAME	2,256	150	-2,106
Fresh and frozen fish	2,118	142	-1,976

products	imports	exports	balance
INDUSTRIAL FOOD	11,708	6,759	-4,949
Flour and pasta	39	1,022	983
Rice	26	402	376
Sugar	226	109	-117
Confectionery	392	479	87
Meat	4,924	765	-4,159
Processed fish	755	128	-627
Processed tomatoes	24	811	787
Other processed vegetables	551	779	228
Cheese and butter	1,768	617	-1,151
Olive oil	1,121	425	-696
Other oils and fats	359	195	-164
WINE and VERMOUTH	267	1,878	1,611
OTHER BEVERAGES	618	334	-284
OTHER PROCESSED AGRICULTURAL PRODS.	3,203	319	-2,884
TOTAL	30,268	13,455	-16,813

FOREIGN TRADE IN AGRO-FOOD PRODUCTS WITH THE EEC AND THIRD COUNTRIES (1) (billion lire)

area and countries	imports	exports	balance
EEC	20,181	9,004	-11,177
France	6,268	2,048	-4,220
Fed. Rep.Germany	4,232	3,875	-357
Belgium - Luxembourg	1,169	493	-676
Netherlands	4,042	524	-3,518
Denmark	1,250	178	-1,072
Spain	1,308	323	-985
Greece	900	242	-658
United Kingdom	691	1,202	511
URSS and COMECON	830	234	-596
OTHER EUROPEAN COUNTRIES	1,307	1,627	320
AMERICA	2,806	1,188	-1,618
USA	810	941	131
Canada	131	146	15
Brazil	708	32	-676
AFRICA	1,165	818	-347
Morocco	172	4	-168
Algeria	9	280	271
Tunisia	223	33	-190
MIDDLE EAST	118	302	184
CHINA	159	1	-158
JAPAN	29	145	116
OTHERS (2)	769	171	-598

(1) Excluding forest products, textiles fibres, wool and other non-food agricultural products.
(2) Australia, New Zealand and other countries in Asia and Oceania.
Source: calculation on ISMEA data.

2

THE STRUCTURE OF ITALIAN AGRICULTURE

SOURCES

During the course of the year, two new sources of data became available on Italian agrarian structures from the Central Statistical Office (ISTAT): the 1988 sample survey which dealt with the EEC field of observation, more limited than the national one and corresponding with a total of 2,779,800 farms; and the 4th Agricultural Census which took into consideration all farms (3,035,682). The first provisional results are available from this latter source and are presented on page 62.

THE NUMBER AND SIZE OF FARMS

From the 1988 sample survey it is evident that the Italian agricultural sector continues to be dominated by a large number of very small farms. About 73% of farms are less than 5 hectares in size, occupying only 16.4% of total agricultural area and 19.7% of the utilised agricultural area. Slightly less than one quarter of farms do not even reach the size of one hectare and account for 1.8% of total area and 2.3% of UAA.

On the other hand, although large farms account for a lower share of the total number, they take up the greater part of the agricultural area.

NUMBERS OF FARMS AND UTILISED AGRICULTURAL AREA BY SIZE OF UAA (thousand)

size of UAA (ha)	1985		1988	
	farms	UAA	farms	UAA
NUMBERS				
Less than 1 (1)	909.3	452.2	796.5	448.3
1 < 5	1,272.9	2,907.2	1,341.9	3,039.6
5 < 10	318.1	2,187.5	341.9	2,345.1
10 < 20	168.1	2,287.3	171.4	2,325.8
20 < 50	92.7	2,784.5	90.9	2,709.7
50 < 100	26.6	1,791.3	24.6	1,685.8
100 and over	13.4	3,190.6	12.6	2,789.0
Total	2,801.1	15,600.6	2,779.8	15,353.3
PERCENTAGES				
Less than 1 (1)	32.5	2.9	28.6	2.9
1 < 5	45.4	18.6	48.2	19.8
5 < 10	11.4	14.0	12.3	15.3
10 < 20	6.0	14.7	6.2	15.1
20 < 50	3.3	17.8	3.3	17.7
50 < 100	0.9	11.5	0.9	11.0
100 and over	0.5	20.5	0.5	18.2
Total	100.0	100.0	100.0	100.0

(1) Including farms without UAA.

TYPES OF ENTERPRISE

The overwhelming majority of farms (90,6%) were owner-operated in 1988. Amongst this group, those run exclusively by family labour predominate. These are even more widespread in the Centre, where they account for 91.1% of all owner-operated farms; in the North too, they represent a very high percentage (86.6%). Share tenancy, once on important type of enterprise, especially in the Centre, is now fading out as a result of legislative and social changes.

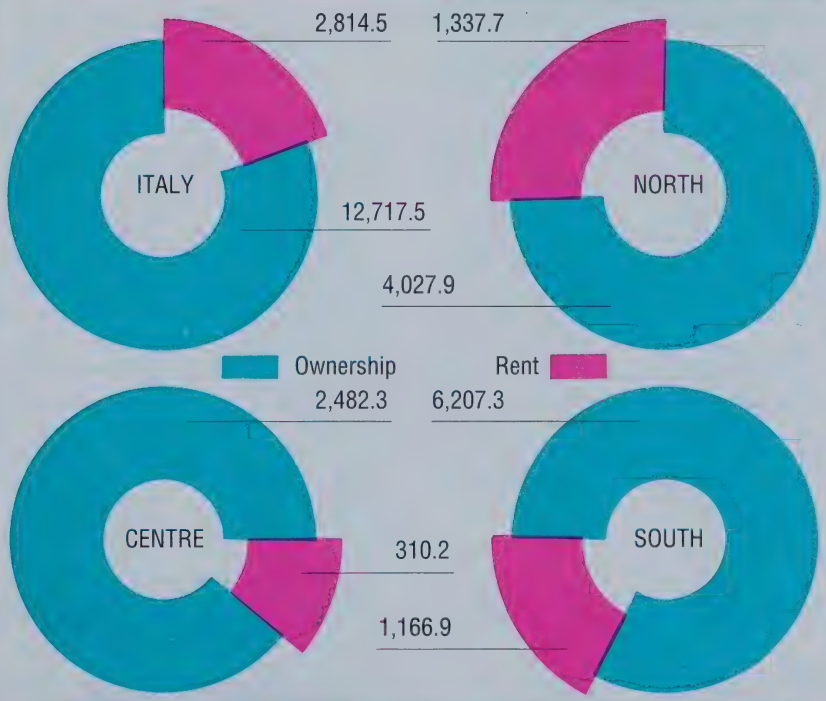
NUMBER OF FARMS BY TYPE OF ENTERPRISE AND TOTAL AGRICULTURAL AREA

district	total	Owner operated holdings			farms	share-tenancy
		with exclusiv. family labour %	with mainly family labour %	with mainly non-family labour %	with hired labour %	and other %
FARMS (thousand)						
North	861.2	86.6	11.2	2.2	2.1	0.5
Centre	454.1	91.1	5.9	3.0	3.6	2.3
South	1,464.5	77.0	16.7	6.3	3.7	0.5
Italy	2,779.8	82.8	13.3	4.5	3.2	0.8
TOTAL AGRICULTURAL AREA (thousand ha)						
North	8,028.7	76.9	16.2	6.9	25.7	0.5
Centre	4,384.7	79.3	12.3	8.4	37.1	2.3
South	9,206.5	63.6	22.9	13.5	18.5	0.8
Italy	21,619.9	71.2	18.6	10.2	24.9	1.0

ACCESS TO AGRICULTURAL LAND IN USE

Ownership continues to represent the most widespread right of access to agricultural land: in the Centre it serves in 88.9% of cases and in 75.1% in the North

UAA BY TYPE OF ACCESS (thousand ha)



UTILISATION OF FARM LAND

Total farm area comprises 15.5 million hectares of utilised agricultural area, (71.5%), 4.3 million hectares of woodland (19.6%) and,finally, 1.8 million hectares of other areas. In turn the UAA is divided into arable land for 54.3%, to permanent pasture for 27.0% and for the rest, into permanent crops, mainly vines (41.9% of farms and 7% of UAA) and olives (33.7% of farms and 6.6% of UAA). The most common crops are cereals, which are grown on 44.7% of farms, occupying 4.8 million hectares (30% of UAA).

NO. OF FARMS AND AREA SOWN TO CERTAIN MAIN CROPS

crops	North	
	no. farms	area sown (ha)
ANNUAL CROPS	656.6	3,146.6
Cereals	431.2	1,658.9
Soft wheat	165.7	444.1
Hard wheat	17.6	65.9
Maize	301.3	773.3
Potatoes	58.2	20.1
Sugar beet	48.7	168.3
Industrial crops	82.6	298.8
Outdoor horticultural crops (1)	314.6	84.5
Rotation forage	209.0	858.2
TREE CROPS (2)	439.9	600.8
Vineyards	347.8	319.2
for DOC quality wines	92.0	151.2
Olive groves	36.2	21.6
Fruit and nuts	158.0	251.0
Citrus	0.1	0.1
PERMANENT PASTURE	333.3	1,618.1
TOTAL UAA	858.1	5,365.5
CULTIVATED WOODLAND (3)	309.0	1,805.3
Other (4)	846.3	911.9
TOTAL AGRICULTURAL AREA	858.2	8,028.7

(1) Including garden plots. (2) Including chestnut groves. (3) Including poplar plantations

thousand farms and thousand hectares)

Centre		South		Italy	
no. farms	area sown (ha)	no. farms	area sown (ha)	no. farms	area sown (ha)
350.9	1,757.1	873.9	3,522.7	1,881.4	8,426.4
234.0	927.9	572.2	2,181.9	1,237.4	4,768.7
135.0	331.1	141.4	167.2	442.1	942.4
42.0	263.5	391.7	1,578.5	451.3	1,907.9
91.7	119.6	87.5	53.1	480.5	946.0
32.2	7.2	94.9	39.1	185.3	66.4
15.8	44.7	15.8	48.0	80.3	261.0
27.4	104.4	45.5	66.0	155.5	469.2
177.5	58.8	346.8	200.9	838.9	344.2
159.4	545.9	220.5	658.4	588.9	2,062.5
322.1	474.8	1,104.7	1,834.2	1,866.7	2,909.8
233.8	193.5	580.8	574.8	1,162.4	1,087.5
31.8	78.9	53.5	56.8	192.6	284.1
198.0	205.1	699.3	800.8	933.5	1,027.5
70.5	72.2	272.3	28.5	500.8	351.7
2.2	0.8	128.8	168.3	131.1	169.2
101.1	560.5	221.1	2,016.1	655.5	4,194.7
453.5	2,792.5	1,461.6	7,374.2	2,773.2	15,532.2
127.5	1,252.6	180.1	1,246.0	616.6	4,303.9
406.0	342.3	867.9	589.9	2,120.2	1,844.1
453.5	4,384.7	1,461.7	9,206.5	2,773.4	21,619.9

(4) Agricultural area not utilised and other.

IRRIGATION

It appears that in 1988 more than a quarter of Italian farms continued to practise irrigation, on an area of about 2.9 million hectares which amounts to more than half their UAA (55.2%).

Irrigation is more common in the North, where more than 34.6% of farms are involved, with a UAA of about 1.8 million hectares or 32.7% of the total and 68.2% of the UAA of the farms practising irrigation.

FARMS WITH IRRIGATION BY DISTRICT

district	farms		area irrigated		%
	number	% of all farms with UAA	hectares	% of UAA	total UAA on farms with irrigation
North	296,642	34.6	1,755,464	32.7	68.2
Centre	76,447	16.9	301,801	10.8	40.9
South	351,162	24.0	829,783	11.3	43.3
Italy	724,251	26.1	2,887,048	18.6	55.2

LIVESTOCK

In contrast with what has resulted from previous investigations, the number of farms with livestock showed a slight increase (+0.1%), even though the main types of livestock enterprise decreased more or less markedly. As compared with 1985, the number of farms with cattle decreased by 38,000 even though the number of head of cattle rose (222,200, a rise of 2.6%).

In contrast, there was an increase of 71,000 head in the sheep sector, over a larger number of farms (+11,200, an increase of 6.9%).

Consequently the average size of beef herd passed from 19 to 21 head, whilst pork and goat sectors remained unchanged and in the sheep sector the average size of herd increased by one head.

FARMS WITH LIVESTOCK AND LIVESTOCK NUMBERS (thousands)

type	1985			1988		
	farms	no. head		farms	no. head	
		000	average per farm		000	average per farm
Cattle	458.2	8,711.8	19	419.5	8,933.9	21
Dairy cows	298.6	2,782.3	9	342.3	3,300.9	10
Pigs	407.1	8,816.1	22	400.6	8,823.1	22
Sows	47.4	955.3	20	54.9	693.8	13
Sheep	163.0	7,521.8	46	174.2	8,236.0	47
Goats	87.4	1,025.4	12	92.8	1,155.2	12
Equines	87.7	150.2	2	68.3	175.4	3
Laying hens	692.1	60,823.4	88	666.2	50,407.2	76
Poultry	420.6	70,157.8	167	458.9	74,200.2	162

CATTLE AND PIG RAISING ENTERPRISES BY NUMBER OF HEAD (thousands)

number of head	North		Centre		South		Italy	
	farms	head	farms	head	farms	head	farms	head
CATTLE								
1 - 2	32.6	52.1	16.7	26.0	25.6	42.9	74.9	121.0
3 - 9	73.7	392.7	29.2	150.4	57.9	318.9	160.8	862.0
10 - 19	37.8	509.0	14.1	185.7	29.5	393.1	81.4	1,087.8
20 - 49	40.6	1,247.7	7.1	202.2	18.9	559.1	66.6	2,009.0
50 and over	27.4	4,010.2	3.1	358.1	5.2	485.8	35.7	4,854.1
Total	212.1	6,211.7	70.2	922.4	137.1	1,799.8	419.4	8,933.9
PIGS								
1 - 2	62.7	87.6	71.0	101.4	135.1	196.4	268.8	385.4
3 - 9	16.4	69.6	20.3	83.6	43.7	186.4	80.4	339.6
10 - 49	7.2	143.5	10.7	199.4	16.5	318.7	34.4	661.6
50 and over	10.5	6,222.2	4.1	916.6	2.4	297.7	17.0	7,436.5
Total	96.8	6,522.9	106.1	1,301.0	197.7	999.2	400.6	8,823.1

LABOUR

Considering all persons engaged in agricultural activities on farms, the volume of labour input did not change between 1987 and 1988. It amounted to 585 million days of which 86.6% were contributed by family labour.

In the North this category continued to account for 89.6% of labour.

Hiring of agricultural contractors increased markedly in 1988, with 38.5% of farms and 5.8 million days involved, the equivalent of 5.4 days per farm. It is more widely practised in the North (46.8% of farms) even though in the Centre a greater number of days per farm (6.3) are required.

There is a tendency to ageing amongst the class of farm managers, with 60.5% more than 55 years old and 29.3% over 65 years.

As compared with 1987 the number of managers who work mainly part-time on the farm has increased (21.3%) with a corresponding drop

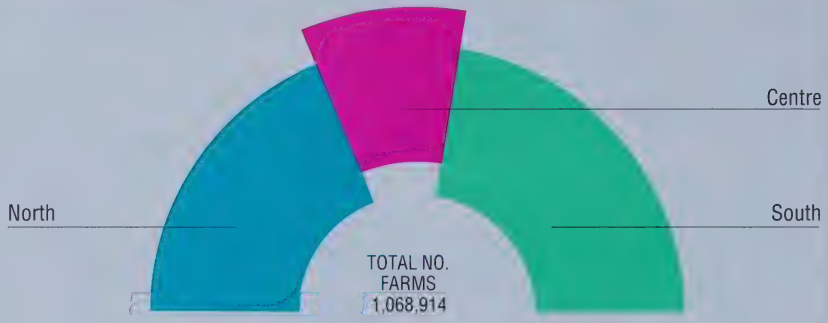
TOTAL FARM LABOUR TIME (percentage of total)

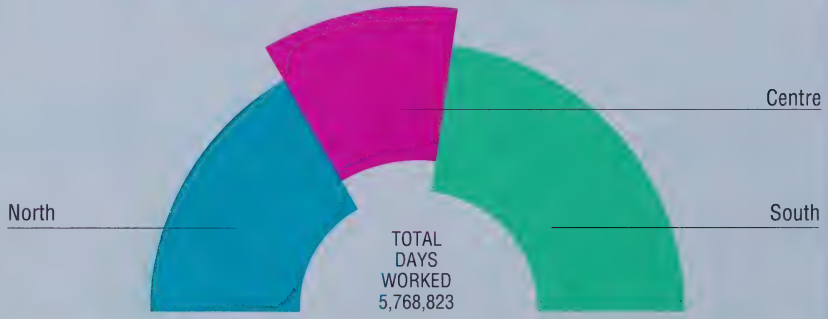
Type of worker	North	Centre	South	Italy
Family	89.6	86.2	84.0	86.6
Operator	49.9	50.2	51.0	50.5
Wife	15.7	18.3	16.2	16.4
Other family	24.0	17.7	16.8	19.7
Non-family	10.4	13.8	16.0	13.4
regular	5.0	5.0	1.2	3.3
casual	5.4	8.8	14.8	10.1
TOTAL (thousand)	223,910	101,417	259,769	585,096

in those who work mainly on their own farm (75.6%).

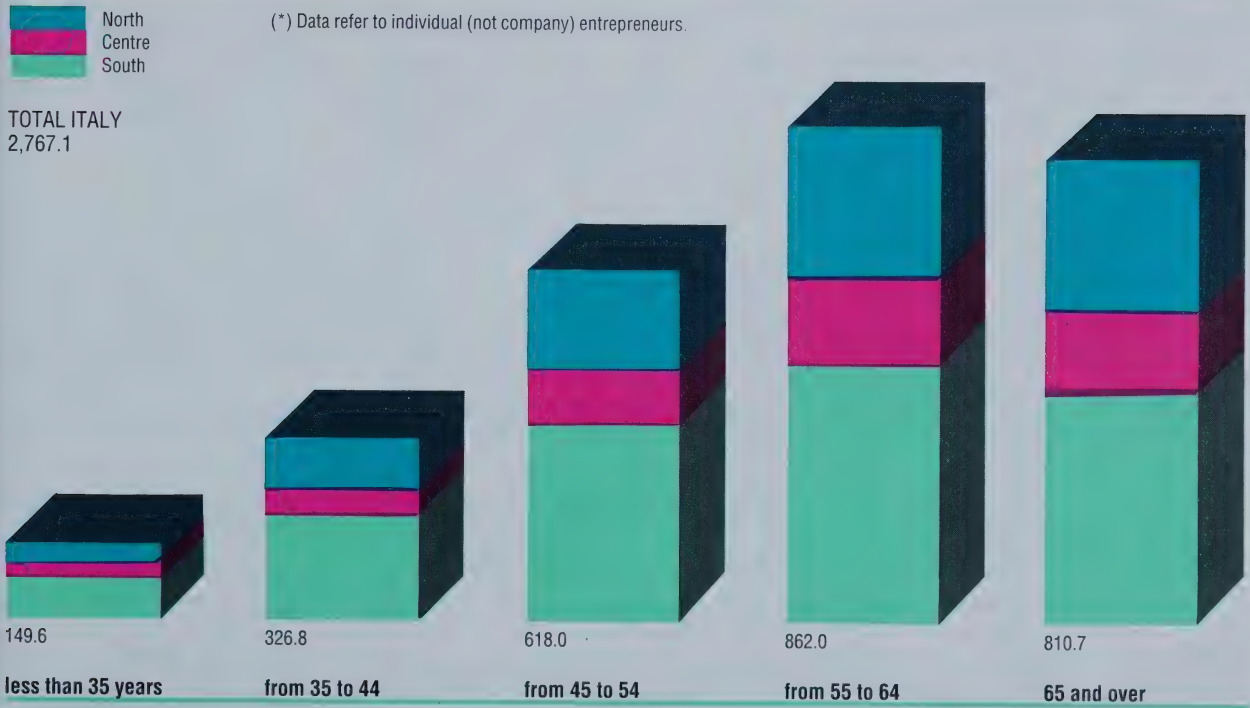
The first results from the recent 1990 Census indicate, however, a slight decrease in the relative importance of part-time farm managers. The reason for this is not yet clear, but it may mark a change in trend and a more professional attitude to management in the agricultural sector.

NO. OF FARMS AND NO. DAYS CONTRACT LABOUR





DISTRIBUTION OF FARMS BY AGE OF ENTREPRENEUR (*) (thousands)



DISTRIBUTION OF FARM ENTREPRENEURS BY FARM AND OFF-FARM EMPLOYMENT

district	total	exclusively on-farm	mainly on-farm			mainly off-farm		
			total	with employment on other farms	with employment in other sectors	total	on other farms	in other sectors
NUMBERS								
North	854,580	656,075	24,140	5,427	15,787	174,365	14,479	106,278
Centre	451,051	332,161	16,241	4,848	5,725	102,649	9,148	67,298
South	1.461,513	1,103,393	46,863	22,556	19,325	311,257	88,703	187,116
Italy	2.767,144	2,091,629	87,244	32,831	40,837	588,271	112,330	360,692
DISTRIBUTION BETWEEN DISTRICTS (%)								
North	30.9	31.4	27.7	16.5	38.7	29.6	12.9	29.5
Centre	16.3	15.9	18.6	14.8	14.0	17.4	8.1	18.7
South	52.8	52.7	53.7	68.7	47.3	53.0	79.0	51.8
Italy	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DISTRIBUTION BETWEEN TYPES OF EMPLOYMENT (%)								
North	100.0	76.8	2.8	0.6	1.8	20.4	1.7	12.4
Centre	100.0	73.6	3.6	1.1	1.3	22.8	2.0	14.9
South	100.0	75.5	3.2	1.5	1.3	21.3	6.1	12.8
Italy	100.0	75.6	3.2	1.2	1.5	21.2	4.1	13.0

NUMBER OF AGRICULTURAL WORK UNITS BY CLASS OF EUROPEAN SIZE UNIT (thousands)

class of size unit (ESU) (*)	North		Centre		South		Italy	
	WU	%	WU	%	WU	%	WU	%
< 2	128.0	15.8	91.1	24.7	216.3	22.6	435.4	20.4
< 4	90.1	11.2	65.5	17.8	195.7	20.5	351.3	16.5
< 6	71.5	8.9	39.6	10.8	119.8	12.5	230.9	10.8
< 8	56.3	7.0	24.1	6.5	74.1	7.8	154.5	7.2
< 12	81.6	10.1	35.6	9.7	92.8	9.7	210.0	9.9
< 16	62.8	7.8	23.8	6.5	60.4	6.3	147.0	6.9
< 40	158.3	19.6	42.4	11.5	114.8	12.0	315.5	14.8
< 100	94.6	11.7	19.8	5.4	49.2	5.1	163.6	7.7
100 and over	63.8	7.9	26.2	7.1	33.0	3.5	123.0	5.8
Total	807.0	100.0	368.1	100.0	956.1	100.0	2,131.2	100.0

(*) 1 ESU = Lire 1.671.600

SPECIALISATION IN PRODUCTION AND ECONOMIC SIZE OF FARM

Altogether 78.8% of farms are completely or partly specialised in production: 67.2% in crop production and 11.5% in livestock (mainly cattle).

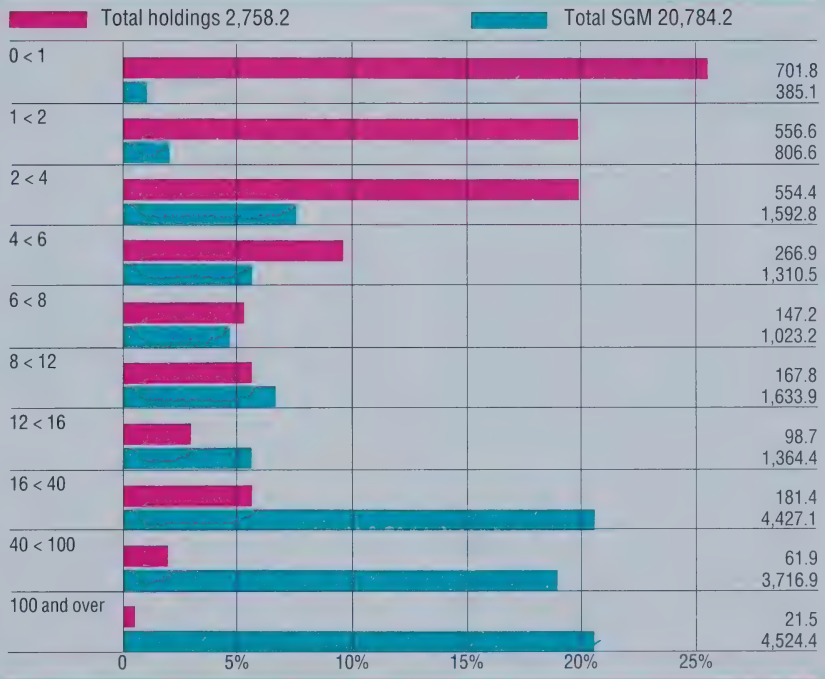
Slightly less than half of all farms carry out activities amounting to less than 4 European Size Units and produce barely 13.4% of national standard gross margin. In contrast, 9.6% of farms account for 61.0% of total income measured in this way.

DISTRIBUTION OF FARMS BY TYPE OF FARMING (TF) (thousands)

TF	1985	
	farms	%
SPECIALISED FARMS	2,173.3	78.2
Annual crops	735.1	26.5
Cereals	305.2	11.0
Other	429.9	15.5
Horticulture and floriculture	45.1	1.6
Permanent crops	1,073.9	38.7
Grapes	321.5	11.6
Olives	277.9	10.0
Other mixed permanent crops	474.5	17.1
Herbivorous animals	302.1	10.9
Dairy cattle	100.7	3.6
Beef cattle	27.9	1.0
Dual purpose cattle	35.7	1.3
Other	137.8	5.0
Granivorous animals	17.1	0.6
MIXED FARMS	605.2	21.8
Mixed crops	367.1	13.2
Mixed livestock	73.9	2.7
Crops and livestock	164.2	5.9
Annual crops and herbivorous animals	98.7	3.6
TOTAL	2,778.5	100.0

1988	
farms	%
2,172.5	78.8
777.3	28.2
302.0	10.9
475.3	17.2
35.3	1.3
1,042.1	37.8
307.4	11.1
273.4	9.9
461.3	16.7
299.8	10.9
95.3	3.5
29.4	1.1
31.4	1.1
143.7	5.2
18.0	0.7
585.7	21.2
364.1	13.2
71.3	2.6
150.2	5.4
88.1	3.2
2,758.2	100.0

HOLDING AND SGM BY CLASS OF EUROPEAN SIZE UNIT (ESU)* (values in thousands)



* 1 ESU = Lire 1,671,600

THE 1990 AGRICULTURAL CENSUS

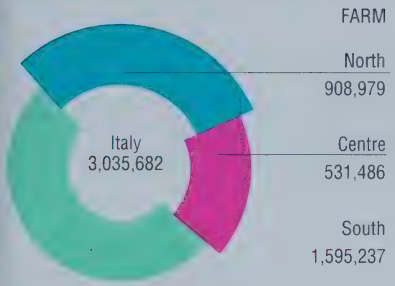
THE NUMBER OF FARMS

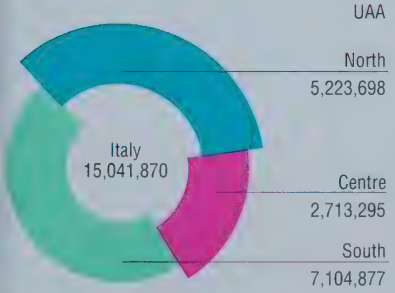
According to the first provisional results there are 3,035,682 farms in Italy with 22.7 million hectares of total land area, of which 15 million are used for agricultural purposes (66.4%). Over the last 30 years there has been an average annual decrease of 1.0%, spread unevenly, however, between different Censuses. In the last eight years, in particular, the number of farms decreased by 7.1%, whilst total area and area utilised fell respectively by 4.1% and 4.9%. The decline in farm numbers principally affected mountain areas (-10.8%), whilst the plains and the hilly areas showed decreases of 6.7% and 5.7% respectively. The contraction in the mountain areas was particularly accentuated in northern Italy.

THE NUMBER OF HOLDINGS AND FARM AREA FROM 1961 TO 1990

census year	farms	farm area (ha)		UAA (ha)		percent of
		total	avj. per farm	total	avj. per farm	UAA
1961	4,293,924	26,571,665	6.2	-	-	-
1970	3,607,262	25,064,210	6.9	17,491,455	4.8	69.8
1982	3,269,192	23,631,533	7.2	15,842,541	4.8	67.0
1990	3,035,682	22,651,401	7.5	15,041,870	5.0	66.4

HOLDING AND FARM AREA BY DISTRICT





THE NO. OF HOLDINGS AND FARM AREA BY ALTIMETRIC ZONE

	farms	area (ha)		average area per farm (ha)	
		total	UAA	total	UAA
Mountains					
1982	742,034	8,139,467	3,913,997	11.0	5.3
1990	661,781	7,746,753	3,668,475	11.7	5.5
Hills					
1982	1,624,468	10,091,533	7,205,454	6.2	4.4
1990	1,531,799	9,671,460	6,831,483	6.3	4.5
Plains					
1982	902,690	5,400,533	4,723,090	6.0	5.2
1990	842,102	5,233,187	4,541,912	6.2	5.4

LIVESTOCK

As compared with 1982, the total herd size for cattle was 12% lower in 1990. It was concentrated for 69.7% in the north of the country, where the most marked drop in numbers had taken place (-831,000 head).

Farms in the area of the plains were most seriously affected, accounting for 57.1% of the fall in numbers. The pig herd amounted to 8.3 million head, a decrease of 668,000 (-7.5%) since 1982. In contrast, there were very strong increases in numbers of sheep (27%) and goats (32.1%).

The most noticeable increases appeared in the South of the country, with mountain areas in general accounting for the greater part of the rise (+26.9%).

NUMBERS OF MAIN TYPES OF LIVESTOCK

census year	livestock			
	cattle	pigs	sheep	goats
1961	9,507,842	3,353,014	6,574,631	1,097,967
1970	8,747,254	5,928,297	6,050,974	883,787
1982	8,686,079	8,950,773	6,745,920	1,009,810
1990	7,661,651	8,282,784	8,565,813	1,252,340

NUMBERS OF LIVESTOCK BY DISTRICT

	1982	1990	% change
CATTLE	8,686,079	7,661,651	-11.8
North	6,172,094	5,340,734	-13.5
Centre	853,571	692,691	-18.8
South	1,660,414	1,628,226	-1.7
PIGS	8,950,773	8,282,744	-7.5
North	6,554,364	6,273,337	-4.3
Centre	1,380,645	1,047,422	-24.1
South	1,015,764	961,985	-5.3
SHEEP	6,745,920	8,565,813	+27.0
North	411,037	396,404	-3.6
Centre	1,653,686	1,987,853	+20.2
South	4,681,197	6,181,556	+32.1
GOATS	1,009,810	1,252,340	+24.0
North	176,238	167,421	-5.0
Centre	92,013	100,494	+9.2
South	741,559	984,425	+32.8

NUMBERS OF LIVESTOCK BY ALTIMETRIC ZONE

	1982	1990	% change
CATTLE			
Mountains	1,423,611	1,343,389	-5.6
Hills	2,581,402	2,220,202	-14.0
Plains	4,681,066	4,098,060	-12.5
PIGS			
Mountains	764,863	658,317	-13.9
Hills	2,768,228	2,276,136	-17.8
Plains	5,417,682	5,348,291	-1.3
SHEEP			
Mountains	2,086,165	2,492,217	+19.5
Hills	3,627,926	4,810,631	+32.6
Plains	1,031,829	1,262,965	+22.4
GOATS			
Mountains	433,194	549,621	+26.9
Hills	487,155	598,552	+22.9
Plains	89,461	104,167	+16.4

LABOUR

Considering all persons employed in agricultural activities in the 1989-90 season, the number of days worked decreased by 24.5% as compared with the 1982 Census.

Farms in the North contributed 44.4% of this drop and those in the South 31.0%. Almost all the reduction in days worked was registered in farms on hilly land (44.4%) and on the plains (38%).

The predominance of family labour (83.4% of the total) over non-family labour continued in 1990. This characteristic is even more marked, despite a certain redimensioning since 1982, in the areas where owner-operated farms are prevalent.

NO. OF DAYS WORK ON FARMS BY DISTRICT

AND BY ALTIMETRIC ZONE (thousands)

	1990			% change 1990 - 1982		
	family	non-family	total	family	non-family	total
DISTRICT						
North	161,236.1	19,182.6	180,418.7	-25.2	-38.5	-26.8
Centre	63,360.6	10,492.4	73,853.0	-31.9	-40.4	-33.2
South	158,620.4	46,846.9	205,467.3	-20.4	-10.7	-18.3
Italy	383,217.1	76,521.9	459,739.0	-24.5	-24.4	-24.5
ALTIMETRIC ZONE						
Mountains	79,929.3	11,098.8	91,028.1	-24.2	-18.5	-23.5
Hills	177,267.7	34,959.5	212,227.2	-24.6	-15.8	-23.3
Plains	126,020.1	30,463.6	156,483.7	-24.5	-34.0	-26.6

FORESTS

Information about size and characteristics of forests in Italy is taken from the National Inventory of Forests carried out by the Ministry for Agriculture and Forests in 1985. The total area under forests, 8.7 million hectares, occupies 28.8% of total national land area.

Of the total forest area 70.9% is made up of coppice and high forest, 3.3% of plantations for intensive non-timber production (chestnuts, cork) and as much as 25.8% of particular forms of vegetation.

The latter, consisting mainly of shrubland, cliff and coastal vegetation, are particularly important from an environmental point of view, and from the point of view of forest development in the future.

Deciduous trees are predominant, occupying 80% of forest area. About 60% of Italian forests are in a healthy state. The main sources of damage are weather (8%), parasites (6%), grazing and game (7%), fires (4%) and other causes, including acid rain (5%). Differences between the data shown in the table and those from other statistical sources, including ISTAT, are mainly due to differences in classification and survey method.

FOREST AREA BY ALTITUDE AND BY TYPE OF OWNERSHIP (thousand ha)

Altitude (metres above sea level)	North	Centre	South	Italy
Up to 500	849	966	1,248	3,063
501 - 1,000	1,183	813	1,248	3,244
1,001 - 1,500	867	205	500	1,572
Over 1,500	672	26	98	796
Total	3,571	2,010	3,094	8,675
Public ownership	1,189	508	1,240	2,945
Private ownership	2,372	1,504	1,850	5,730

FOREST AREA BY SPECIES OF TREE (thousand ha)

	North	Centre	South	Italy
High forests	1,178	231	770	2,179
Red spruce	263	0	1	264
White pine	128	26	75	229
Beech	30	39	155	224
Coniferous	292	13	21	326
Mixed, mainly coniferous	111	34	72	217
Deciduous	103	26	156	285
Coppice	1,148	1,368	857	3,673
Chestnut	196	108	71	375
Beech	155	83	93	331
Turkey oak	26	123	60	209
Other oak	105	261	173	539
Mixed	913	666	342	1,921
Non-timber production	136	28	125	289
Special types of vegetation	662	295	1,204	2,161
Other	147	87	138	372
Total	3,571	2,010	3,094	8,675

3

THE RESULTS OF THE FARM ACCOUNTING DATA NETWORK

ECONOMIC PERFORMANCE IN 1989

The Farm Accounting Data Network (RICA/FADN) was established by the EEC with Regulation 79 of 1965 and has as its main objective the systematic collection of information necessary to keep track of incomes of farm entrepreneurs and the operations of farms. For Italy at present the number of farms in the sample is 18,000 per year. Regional administrations and Farmers' Organisations take part in the collection of data; accounting methods and data processing procedures are the responsibility of INEA which is also the official liaison organisation between the EEC and the Italian state. Farms included in the FADN are submitted to a system of surveying which reveals their structural characteristics, factor endowment, the composition of output and the structure of costs. All this information is available on computer programmes at each regional office of the National Institute of Agricultural Economics.

ECONOMIC PERFORMANCE BY ALTIMETRIC ZONE - AVERAGE PER FARM

altimetric zone	no. observations	UAA (ha)	WU (no.)	VFO	variable costs	fixed costs	net income
						000 lire	
Mountains	3,632	19.82	1.79	49,655	24,071	10,945	23,386
Hills	10,124	16.13	1.75	55,994	20,870	10,191	29,789
Plains	5,714	15.30	2.00	93,659	47,485	18,050	40,067
Total	19,470	16.57	1.83	65,865	29,278	12,638	31,611

ECONOMIC PERFORMANCE BY DISTRICT - AVERAGE PER FARM

district	no. observations	UAA (ha)	WU (no.)	VFO	variable costs	fixed costs	net income
						000 lire	
North	7,123	17.01	2.12	96,490	48,593	19,376	42,546
Centre	4,527	18.14	1.93	65,851	23,090	11,662	36,563
South	7,820	15.26	1.52	37,978	15,268	7,065	18,784

ECONOMIC PERFORMANCE BY ESU - AVERAGE PER FARM

ESU	no. observations	UAA (ha)	WU (no.)	VFO	variable costs	fixed costs	net income
						000 lire	
2 - 4	1,853	4.64	1.10	11,631	4,782	2,890	5,378
4 - 8	4,416	7.76	1.35	20,495	8,554	4,891	9,614
8 -16	5,885	12.97	1.64	47,904	16,017	8,278	28,381
16 - 40	5,117	22.59	2.10	77,495	34,989	15,161	36,754
40 -100	1,819	33.06	2.97	176,928	86,093	32,231	79,181
> 100	379	73.32	5.13	448,666	246,716	90,188	168,660

ECONOMIC PERFORMANCE BY TYPE OF FARMING - AVERAGE PER FARM

TF	no. observations	UAA (ha)	WU (no.)	VFO	variable costs	fixed costs	net income
						000 lire	
Annual crops	4,513	19.90	1.67	66,076	21,082	12,316	34,245
Vegetables and flowers	1,109	1.64	2.33	77,909	26,802	13,947	37,304
Permanent crops	4,606	7.47	1.56	42,313	12,027	9,155	21,334
Herbivorous animals	4,025	26.84	2.12	98,305	5,767	17,398	45,984
Granivorous animals	42	8.97	2.05	373,542	246,582	25,222	116,465
Mixed crops	2,277	12.84	1.69	41,078	15,378	9,534	18,553
Mixed livestock	726	15.06	1.92	53,501	30,097	10,550	24,864
Mixed	2,172	22.12	2.08	73,279	41,635	14,910	32,694

4

THE LEGISLATIVE & ADMINISTRATIVE FRAMEWORK

THE ROLES OF CENTRAL AND REGIONAL ADMINISTRATIVE BODIES

The framework of authority as regards agriculture is regulated by the following laws:

- **Law no. 281 of 16th May 1970** and the subsequent **Presidential decree no.11 of 15th January 1972.**

- **Law no. 382 of 22nd July 1975** and subsequent **Presidential decree no. 616 of 24th July 1977.**

Both transfer to the Regional authorities the greater part of responsibility for agriculture.
Thus all the measures most directly related to production have become subject to Regional intervention, including:

- Crop production and livestock rearing
- Collection, processing and distribution of produce
- Extension and professional training

As stated in article 4 of the Presidential decree 616/77 "the Central Government shall excercise the functions of guiding and coordinating... and, also for those areas of responsibility tranferred or delegated, functions concerning international relations, those with European Economic Community, national defence and public security".

In particular, in agriculture, the main responsabilities of the Central authorities concern:

- research, experimentation and information of national interest
- measures of national interest for regulating agricultural markets
- guarantee of security in supplies
- the organisation of international trade
- the fund for national solidarity in case of catastrophe or adverse climatic conditions

In the process of national planning, for the purpose of carrying out policies for production, agricultural markets and food, the Central authorities decide:

- the orientation of production and objectives
- areas of the country to be given preference
- maximum levels for incentives
- measures for implementing market policies
- general guidelines for implementing EEC regulations and directives
- financial coordination between regional and national intervention measures as regards markets

PLANNING AND LEGISLATION GOVERNING INTERVENTION

THE NATIONAL PLAN FOR AGRICULTURE

Planning in the Italian agricultural sector for the five year period 1986-1990 is governed by the National Plan for Agriculture drawn up by the Ministry for Agriculture and Forests in accordance with its responsibilities for guiding and coordinating the sector.
The National Plan for Agriculture has the following objectives:

CENTRAL OBJECTIVE

- Support to and development of agricultural incomes.

This objective is to be pursued by improving the efficiency of the farm enterprise in a market-orientated agricultural sector designed to make the maximum contribution to the stable economic growth of the nation.

SPECIFIC OBJECTIVES

- Protection of employment in agriculture, especially of young people, and particularly in economically backward areas, in order to open up opportunities for mixed activities
- Promotion of balanced economic growth, evenly spread over national territory
- Protection of land, environment and water resources
- Maintenance of a degree of self-sufficiency in food compatible with resources and national agricultural productivity

The plan is made up of a set of sub-programmes. These are:

AN OUTLINE PLAN

The first edition was approved by the CIPAA *(Interministerial Committee for Food and Agricultural Policy)* on 1st August 1985. There have subsequently been two updated versions: the first was approved by CIPE *(Interministerial Committe for Economic Planning)* on 23rd April 1987, the second, at present in force, on 13th October 1989.

SECTORAL PLANS

- Olives and olive oil
- Grapes and wine
- Sheep and goats
- Bee-keeping (approved by CIPE on 28th June 1990).

ACTION PLANS

- Against plants pests and diseases
- Against low fertility rates

The National Plan for Agriculture reconciles objectives and measures in national policy with those of Community policy and both in analytical terms and with regard to the future, emphasises the importance of a synergy of initiatives. In fact, the greater part of intervention measures in Italy are governed by **EEC Regulations** the most important of which are illustrated in the following table.

THE MAIN REGULATIONS OF THE EUROPEAN ECONOMIC COMMUNITY

regulation		purpose
REG. 3808/89	which modifies	Acceleration of the adjustment process in agricultural production
	REG. 797/85	Improving the efficiency of agrarian structures
	REG. 1094/88	Retirement of land from agricultural production
	REG. 1096/88	Encouraging retirement from agricultural activities
	REG. 4115/88	Extensivisation of production
REG. 270/79	*modified by Reg. 1760/87*	Development of agricultural extension and information
REG. 496/80	*modified by Reg. 1442/88*	Concession of premiums in the 1988-89/1995-96 crop years for the destruction of vineyards
REG. 355/77	*modified by Reg. 1932/84*	Improvement of conditions for marketing and processing agricultural produce
REG. 1401/86		The improvement of agriculture in certain less-favoured areas in the north of Italy
REG. 2088/85		Integrated Mediterranean Programmes
REG. 2052/88		The emission of structural funds, their effectiveness and the coordination of these measures with those financed by the European Investment Bank and other existing sources of finance

AGRICULTURAL STABILISERS

In order to bring agricultural markets into equilibrium and to reduce budget problems, from 1988 onwards the European Community has introduced mechanisms for limiting production known as agricultural stabilisers. They are in operation for all the products subject to the common organisation of the market and reduce the level of support if production thresholds or maximum guaranted quantities (MGQ) are surpassed.

MGQ FOR THE MAIN PRODUCTS

1990/91 CROP YEAR (thousand tons.)

Cereals	160,000
Sugar	
Quota A	11,187
Quota B	2,488
Sunflower	2,000
Soya	1,300
Tobacco	399
Olive oil	1,350
Oranges	1,244
Peaches	337
Apples	318.5
Processed tomatoes (1)	
Concentrate	3,400
Peeled	1,503
Other	664
Milk (1)	104,116

(1) Excluding Portugal.

LAW NO. 752/86

The legal instrument governing finance for the National Plan for Agriculture is law no. 752 of 8th November 1986: "The law for expenditure over several years for measures planned in the agricultural sector".

As foreseen in the Outline Plan, this law provides for financing for measures undertaken by the Central Government and by Regions, authorising overall expenditure for the five-years period 1986-1990 of 16,500 billion lire and stipulating allocationa year by year.

In response to proposals by the Ministry for Agriculture and Forests, each year the CIPE approves the deliberations through which the National Plan for Agriculture is implemented and provides for the measures foreseen by the Plan using the financial means made available though the law no. 752/86.

FINANCE EROGATED UNDER LAW NO. 752/86

CIPE deliberation	allocation (billion lire)
17th December 1986	2,765,000
23rd April 1987	2,993,000
14th June 1988	3,250,000
2nd May 1989	3,292,000
15th May 1990	3,029,000

THE NATIONAL PLAN FOR FORESTS

This Plan was envisaged in article 2 of the law no. 752/86 and was approved by the CIPE (Interministerial Committee for Economic Planning) in December 1987. The objectives include the establishment of consortia for the management of forest resources, measures to help firms as regards technological development and the maintenance and development of forests, a policy for the improvement of infrastructure, the establishment of urban parks.

LAW NO. 183/87

This guarantees finance for Community Regulations through a rotating fund at the Ministry for the Treasury.

LAW NO. 88/88

This law concerns inter-professional agreements and contracts for the cultivation and sale of agricultural pro-

ducts for processing or for marketing unprocessed.
The law attempts to regulate supply so as to bring it into line with demand in foreign and domestic markets, to improve the quality of production, to establish criteria and general conditions for production and sale of products and for supplying services, to fix product prices in advance or criteria for the determination of prices. The Ministry for Agriculture may intervene in establishing agreements, in particular as regards the product concerned, the methods and timing of delivery, the minimum price, the methods and timing of payment, quantities and quality requirements, the period for stipulating contracts.

LAW NO. 87/90

Law no. 87/90 was approved on 9th April 1990 for "urgent measures in the livestock sector" aimed at restructuring production and marketing in the sector in order to adapt to the needs of the market. To this end, a five-year fund has been established at the Ministry for Agriculture and Forests with an endowment of 340 billion lire.

OTHER NATIONAL LAWS

Law no. 64 of 1st March 1986
"Regulation of special intervention in Southern Italy".

The three year programme which followed the emanation of the law provides for specific measures in agriculture as regards development of the livestock sector, of typically Mediterranean crops and of productive forestry.

The law no. 64/86 is implemented by the Department for Special Intervention in Southern Italy (MISM); in April 1989 the Minister for Southern Italy and the Minister of Agriculture agreed on an outline programme to regulate the measures by which the two Ministries will harmonise initiatives for agriculture.

Law no. 44 of 28th February 1986
"Special measures for encouraging and developing entrepreneurial capacity amongst young people in Southern Italy".

Law no. 181 of 26th April 1982
"Arrangements for drawing up the annual and pluri-annual State budget"

This established the Fund for Investment and Employment, implemented by the Ministry for the Budget.
For agricultural projects a consultative liaison committee was established within the Ministry for Agriculture and Forests.

PRINCIPAL ORGANISATIONS IN THE AGRICULTURAL SECTOR

PUBLIC INSTITUTIONS

- Camera dei Deputati
  XIII Commissione parlamentare per l'agricoltura
- Senato della Repubblica
  IX Commissione parlamentare per l'agricoltura e la produzione agro-alimentare
- Ministero dell'Agricoltura e delle Foreste (MAF)

MAF OFFICES

- Lab. Centrale di Idrobiologia
- Ufficio Centrale di Ecologia Agraria e Difesa delle piante colpite dalle avversità meteoriche UCEA
- Ufficio Enologico
- Commissariati per la liquidazione degli usi civici
- Ispettorati compartimentali e provinciali dell'alimentazione presso le regioni a statuto speciale
- Servizio controllo vivai

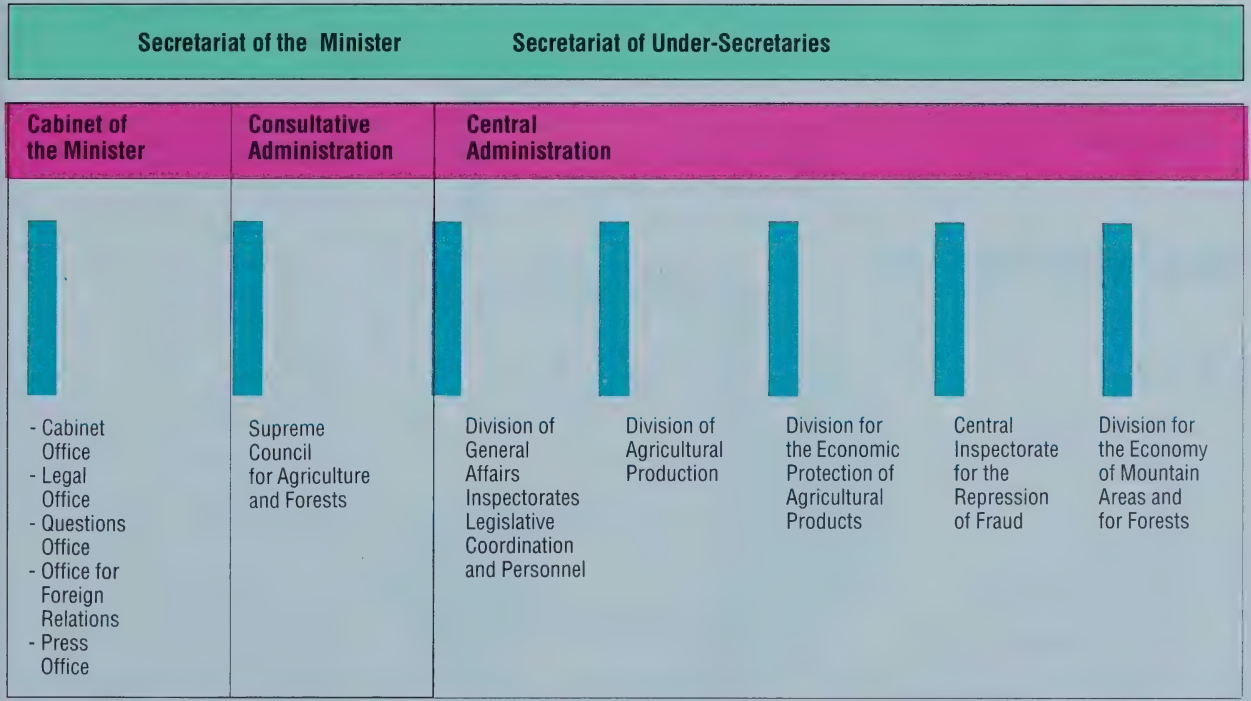
MAF-CONTROLLED BODIES

- Azienda di Stato per gli interventi nel Mercato Agricolo - AIMA
- Gestione ex Aziende di Stato per le Foreste Demaniali

MAF-SUPERVISED BODIES

- Agecontrol
- Cassa per la Formazione della Proprietà Contadina
- Ente Nazionale Cavallo Italiano ENCI
- Ente Nazionale Corse al Trotto ENCAT
- Ente Nazionale delle Sementi Elette - ENSE
- Ente Risi
- Istituti di Ricerca e Sperimentazione Agraria
- Istituto Nazionale della Nutrizione - INN
- Istituto Nazionale di Biologia della Selvaggina
- Istituto Nazionale di Economia Agraria - INEA
- Istituto per Studi e Ricerche sul Mercato Agricolo - ISMEA
- Jockey Club Italiano
- Risanamento Agro Industriale Zuccheri s.p.a. - RIBS
- Società degli Steeple Chases d'Italia
- Unione Nazionale Incremento Razze Equine - UNIRE

MINISTRY FOR AGRICULTURE AND FORESTS


Secretariat of the Minister
Secretariat of Under-Secretaries
Cabinet of the Minister
Consultative Administration
Central Administration
- Cabinet Office
- Legal Office
- Questions Office
- Office for Foreign Relations
- Press Office
Supreme Council for Agriculture and Forests
Division of General Affairs Inspectorates Legislative Coordination and Personnel
Division of Agricultural Production
Division for the Economic Protection of Agricultural Products
Central Inspectorate for the Repression of Fraud
Division for the Economy of Mountain Areas and for Forests

REGIONAL DEPARTMENTS OF AGRICLTURE

- Ispettorati Provinciali
- Enti di Sviluppo Agricolo
- Osservatori per le malattie delle piante

OTHER BODIES

Principal public bodies

- National research bodies
  CNR
  ENEA
  ISTAT
- Camere di Commercio Industria, Artigianato e Agricoltura
- Consorzi di Bonifica, di Irrigazione e di Miglioramento Fondiario
- Istituti di Credito Agrario
- Centri interregionali di Formazione e Divulgazione Agricola
  CIFDA

Principal trade unions, producers' associations and cooperatives

- Confederazione Nazionale dei Coltivatori Diretti
  CCDD
- Confederazione Generale dell'Agricoltura Italiana
- Confederazione Italiana Coltivatori
- Federbraccianti
  CGIL
- Unione Generale Coltivatori
  CISL
- Unione Italiana Salariati e Braccianti Agricoli
  UIL
- Confederazione Cooperative Italiane
  CONFCOOPERATIVE
- Associazione Nazionale delle Cooperative e Mutue
  ANCA LEGA
- Associazione Generale Cooperazione Italiana
- Associazioni ed Unioni dei Produttori
- Associazione Italiana Allevatori e Associazioni Provinciali
- Federconsorzi e Sistema dei Consorzi Agrari Provinciali
- Unione Nazionale Costruttori Macchine Agricole
  UNACOMA

APPENDIX

5

GLOSSARY

Access to UAA

The relationship between enterprise and farm capital. It can be:

- ownership
- rent.

Agricultural contracting

The supply of labour to third parties by appropriately qualified firms, with or without the use of agricultural machinery.

ESU

European Size Unit

Is given by the sum of the SGM of the productive activities of the farm.
For 1987 each Unit is equal to 1,200 ECU or 1,671,000 lire (1 ECU=1,323 lire). Thus a holding with a total SGM of 7850 ECU has an economic size of 6.54 ESU.

Fixed costs

Fixed costs are those incurred for employing factors of production with lives of several years: amortisation, interest, land rents, expenses connected with labour employed on a permanent basis.

GDP

Gross Domestic Product

The outcome of productive activities carried out on national territory; it is equivalent to the overall value of goods and services produced within a determined territory within a specified period of time, which is usually a calendar year.
It does not include the value of intermediate output.

Intermediate agricultural inputs

Expenditure on intermediate agricultural inputs is that for seed, fertilisers, pesticides, feed compounds and other expenditure for livestock, energy, irrigation water and various services.

Net Income

Is the reward to all factors of production belonging to the farm entrepreneur: land, labour and capital.

Production subsidies

Premiums and payments erogated by public bodies in favour of the agricultural sector.

SGM

Standard Gross Margin

This is the parameter determined for each productive activity by the difference between the value of final output and the sum of certain specific costs (seed, fertiliser, pesticides, feedstuffs, forage etc.), excluding those for labour and machinery.
Gross margins calculated in this way are defined as "standard" in that the value of final output and costs are calculated on a three-year average, with reference to the altimetric zone of each region.

The SGM are expressed in European Units of Account (ECU) and up-dated by INEA when surveys of farm structures or the agricultural census of ISTAT take place.
The sum of SGM from all the productive activities on the farm corresponds with its economic dimension and is expressed in ESU (European Size Units).

Total farm area

In the surveys on farm structure this means the total of UAA, cultivated woodland (woods and poplar groves), unutilised agricultural areas and other areas within the perimeter of the farm.
It differs, thus, from the definition used in annually published agricultural statistics in that in the latter case is included land abandoned and not forming part of a holding.

Types of enterprise

The relationship between enterprise and labour. It can be:

- owner - operator
- farms with hired labour and/or share-croppers
- share-tenancy
- other forms

TF

Types of farming
The classification of farms by type of farming is based on determination of the economic performance of the various productive activities carried out on the farm and the combination of these activities.
For this purpose, the numbers of hectares cultivated or livestock raised are multiplied by the SGM of the zone in which the farm is located. The resulting combination is compared with a typology classification scheme which is used to define the TF on the basis of criteria defined at Community level and is valid for official statistics.
A farm is classsified as specialised when the SGM of one activity or of several similar activities exceeds 2/3 of total SGM on the holding.

UAA

Utilised Agricultural Area
Is made up of all agricultural land, permanent meadows and pasture, agricultural tree crops, household gardens and groves for (edible) chestnuts.

VA

Value added
Is the sum of the difference between the value of production of goods and services from individual productive sectors and the value of intermediate goods and services used up in the period specified.
It coincides with the sum of remuneration of factors of production and of depreciation in each sector.
Value added at factor cost, as distinct from that at market prices, includes any subsidies erogated by the public administration to the different productive sectors.

Variable costs

Variable costs are those incurred for the employment of single use factors of production such as seeds, fertilisers, pesticides, energy, hiring charges, casual labour.

VFO

The value of final output

The value of production that can be sold and therefore, in agriculture, it is equal to the harvested crop minus the share re-used on the holding as a means of production.

WU

Work unit

According to the EEC definition for the structural surveys a Work Unit is equivalent to the work of one person who is engaged for at least 2,200 hours in the course of the year.

USEFUL ADDRESSES

MINISTRY FOR AGRICULTURE AND FORESTS

Roma - via XX Settembre 20
tel. 06/4665

REGIONAL DEPARTMENTS OF AGRICULTURE

Abruzzo - Pescara - II Dipartimento
via Catullo 17
tel. 085/63941

Basilicata - Potenza
via Anzio 44
tel. 0971/45991-45992

Calabria - Catanzaro
viale De Filippis 276
tel. 0961/53957

Campania - Napoli
via Oberdan 32
tel. 081/7812111

Emilia-Romagna - Bologna
via Aldo Moro 38
tel. 051/283111-283516

Friuli-Venezia Giulia - Udine
via Percoto 16
tel. 0432/501054-293954

Lazio - Roma
via Rosa Raimondi Garibaldi 7
tel. 06/5133490-5133703

Liguria - Genova
via Fieschi 15
tel. 010/54851

Lombardia - Milano
piazza IV Novembre 5
tel. 02/67651

Marche - Ancona
corso Mazzini 148
tel. 071/204690

Molise - Campobasso
Via Sauro1
tel. 0874/9491

Piemonte - Torino
corso Stati Uniti 21
tel. 011/57171

Puglia - Bari
lungomare Nazario Sauro 1
tel. 080/401111

Sardegna - Cagliari
via Pessagno
tel. 070/302901-305293

Sicilia - Palermo
viale Regione Siciliana
ang. via Leonardo da Vinci
tel. 091/6961111-379111

Toscana - Firenze
via di Novoli 26
tel. 055/439311

Trentino-Alto Adige:
Provincia Autonoma di Trento
Trento - LocalitàMelta 112
tel. 0461/8959020

Provincia Autonoma di Bolzano
Bolzano - via Brennero 6
tel. 0471/995000

Umbria - Perugia
Centro Direzionale di Fontivegge
tel. 075/6961

Valle d'Aosta - Quartu
località Amerique 127/A
tel. 0165/3031

Veneto - Mestre
via Torino 110
tel. 041/5495411

NATIONAL RESEARCH BODIES FOR AGRICULTURE

CNR - Roma
piazzale Aldo Moro 1
tel. 06/49931

ENEA - Roma
viale Regina Margherita 125
tel 06/85281

INEA - Roma
via Barberini 36
tel. 06/4744261-2-3

ISTAT - Roma
via Balbo 16
tel. 06/46731

ISMEA - Roma
via Nomentana 183
tel. 06/8441010

INN - Roma
via Ardeatina 546
tel. 06/5032412

Istituto Nazionale di Biologia della Selvaggina
Ozzano Emilia (BO)
via S. Guelfi 23/A
tel. 051/798746

AGRICULTURAL RESEARCH INSTITUTES

Ist. Sper. Agronomico
Bari - via Celso Ulpiani 5
tel. 080/221558-366922

Ist. Sper. per l'Agrumicoltura
Acireale (CT) - corso Savoia 190
tel. 095/891555-891065

Ist. Sper. per l'Assestamento Forestale e l'Apicoltura
Trento (Villazzano) - via Giordano 8
tel. 0461/920578

Ist. Sper. per la Cerealicoltura
Roma - via Cassia 176
tel. 06/3285705

Ist. Sper. per le Colture Foraggere
Lodi (MI) - viale Piacenza 25
tel. 0371/31838

Ist. Sper. per le Colture Industriali
Bologna - via di Corticella 133
tel. 051/371157

Ist. Sper. per la Elaiotecnica
Pescara - via Cesare Battisti 229
tel. 085/95212

Ist. Sper. per l'Enologia
Asti - via Pietro Micca 35
tel. 0141/55205

Ist. Sper. per la Floricoltura
Sanremo (IM) - c. degli Inglesi 508
tel. 0184/884944

Ist. Sper. per la Frutticoltura
Roma (Ciampino) - via Fioranello 52
tel. 06/7240098

Ist. Sper. Lattiero Caseario
Lodi (MI) - via A. Lombardo 14
tel. 0371/32523-30654

Ist. Sper. per la Meccanizzazione Agricola
Monterotondo (Roma)
via della Pascolare 16
(via Salaria km.29,200)
tel. 06/9006511

Ist. Sper. per la Nutrizione delle Piante
Roma - via della Navicella 2
tel. 06/736980

Ist. Sper. per l'Olivicoltura
Cosenza - via Silvio Pellico 50
tel. 0984/861959-3861960

Ist. Sper. per l'Orticoltura
Pontecagnano (SA)
via Cavalleggeri 25
tel. 089/381252-381293

Ist. Sper. per la Patologia Vegetale
Roma - via Carlo G. Bertero 22
tel. 06/8274218

Ist. Sper. per la Selvicoltura
Arezzo - via S. Margherita 80
tel. 0575/353021-2

Ist. Sper per lo Studio e la Difesa del Suolo
Firenze - piazza D'Azeglio 30
tel. 055/2477242-3-4

Ist. Sper per il Tabacco
Scafati (SA) - via Vitiello 66
tel. 081/8631141

Ist. Sper. per la Valorizzazione Tecnologica dei Prodotti Agricoli
Milano - via G. Venezian 26
tel. 02/2365502-2364004

Ist. Sper. per la Viticoltura
Conegliano (TV) - via 28 Aprile 26
tel. 0438/61625-61665

Ist. Sper. per la Zoologia Agraria
Firenze (Cascine del Riccio)
via Lanciola 12/A
tel. 055/209184

Ist Sper. per la Zootecnia
Roma - via O. Panvinio 11
tel. 06/8394641

TRAINING AND EXTENSION CENTRES

CIFDA di Minoprio
viale Raimondi 48
22070 Vertemate con Minoprio (Como)
tel. 031/900224

CIFDA di Eboli
Località Borgo Cioffi
84025 Eboli (Salerno)
tel. 0828/347404-347405

CIFDA di Metaponto
c/o Azienda Pantanello
S.S. 106 Jonica, km. 448,200
75010 Metaponto di Bernalda (Matera)
tel. 0835/745036-745126

CIFDA di Foligno
c/o Centro Mancini
via Cupa 18
06037 Sant'Eraclio di Foligno (Perugia)
tel. 0742/670700

CIFDA di Cagliari
Casella postale 262
09100 Cagliari
tel. 070/543226

CIFDA di Palermo
Hotel Azzolini Palm Beach
90135 Palermo
tel. 091/8682034

FORMEZ
Palazzo dei Congressi
Mostra d'Oltremare
80125 NAPOLI

OTHER BODIES

Azienda di Stato per gli Interventi nel Mercato Agricolo
A.I.M.A.
Roma - via Palestro 81
tel. 06/474991

Cassa per la Formazione della Proprietà Contadina
Roma - via Nizza 128
tel. 06/841331

Consorzio Nazionale per il Credito Agrario di Miglioramento
Roma - v.le Castro Pretorio 118
tel. 06/464832

Ente Nazionale Cellulosa e Carta
Roma - v.le Regina Margherita 262/e
tel. 06/8481

Ente Nazionale Previdenza e Assistenza per gli Impiegati dell'Agricoltura
Roma - v.le Beethoven 48
tel. 06/54581

Ente Nazionale Risi
Milano - P.zza Pio XI 1
tel. 02/874153

Ente Nazionale delle Sementi Elette
Milano - via F.Wittgens 4
tel. 02/864023

Federazione Italiana dei Consorzi Agrari
Roma - via Curtatone 3
tel. 06/46641

Fondo Assicurativo Agricoltori F.A.T.A.
Roma - via Urbana 169
tel. 06/47651

Food and Agriculture Organization of the United Nations F.A.O.
Roma - v.le Terme di Caracalla
tel. 06/57971

Istituto Nazionale per il Commercio Estero ICE
Roma - via Liszt 21
tel. 06/59921

Istituto Nazionale Economia Montana INEMO
Roma - p.zza della Rovere 104
tel. 06/6879383

Servizio Contributi Agricoli Unificati
Roma - via Barberini 67
tel. 06/4779

Società Agricola Forestale per le Piante da Cellulosa e Carta
Roma - via dei Crociferi 19
tel. 06/6789045

FARMERS' ORGANIZATIONS, TRADE UNIONS, AND PRODUCERS' ASSOCIATIONS

Confederazione Nazionale Coltivatori Diretti
Roma - via XXIV Maggio 43
tel. 06/46821

Confederazione Generale dell'Agricoltura
Roma - corso Vittorio Emanuele 101
tel. 06/65121

Confederazione Italiana Coltivatori
Roma - via Fortuny 20
tel. 06/3969931

Federbraccianti CGIL
Roma - via L.Sera 31
tel. 06/55431

Unione Generale Coltivatori CISL
Roma - via Tevere 20
tel. 06/862857

Unione Italiana Mezzadri e Coltivatori UIME
Roma - via XX Settembre 118
tel. 06/4810911

Unione Italiana Salariati e Braccianti Agricoli UIL
Roma - via Sallustio 15
tel. 06/465649

Associazione Nazionale delle Cooperative Agricole ANCA LEGA
Roma - via Guattani 13
tel. 06/844391

Confederazione Cooperative Italiane CONFCOOPERATIVE
Roma - Borgo S. Spirito 78
tel. 06/650861

Associazione Generale delle Cooperative Italiane
Roma - v.le Somalia 164
tel. 06/8313753

Unione Nazionale Cooperative Italiane UNCI
Roma - via S. Sotero 32
tel. 06/6384249

Union Camere
Roma - piazza Sallustio 21
tel. 06/47041

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INDEX

Foreword

Territory, population and economy
page 6

General characteristics
The agricultural area and the availability of land
Trends in GDP

Agriculture and the environment
page 12

I

The Italian agro-industrial system in 1991

page 18

The agro-industrial system
Factors of production
Intermediate inputs
Investment
Agricultural credit
Mechanisation
Employment
Agriculture
Value added
Productivity
Production
Prices and costs
The value of final agricultural output and agricultural income
The food industry
Retail distribution
Cooperation
Food consumption
Foreign trade

2

The structure of Italian agriculture

page 46

Sources
The number and size of farms
Types of enterprise
Access to agricultural land
Utilisation of farm land
Irrigation
Livestock
Labour
Specialisation in production and the economic size of farm
The 1990 Agricultural Census
The number of farms
Livestock
Labour
Forests

3

The results of the Farm Accounting Data Network

page 72

Economic performance in 1989

4

The legislative and administrative framework

page 76

The roles of Central and Regional administrative bodies
Planning and the principal legislation governing intervention
Principal organisations in the agricultural sector

5

Appendix

page 86

Glossary
Useful addresses

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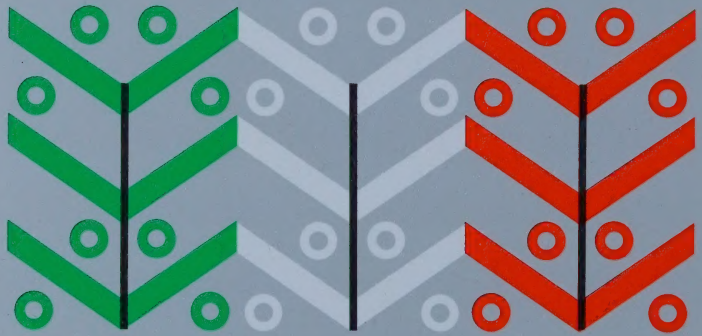

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